

KANTAR TNS

Houston Ad Effectiveness Spring/Summer 2017

October 21, 2017



the official visitors site for
HOUSTON

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1 Growth Summary



Growth summary



Your business issues

- With 17.3 domestic visitors and 3.2 international visitors (2.2 from Mexico), tourism supported an estimate 141,000 jobs in Houston in 2016 and generated \$16.5 billion for the local economy.
- The country's fourth largest city (after NY, LA, and Chicago) ranks #6 on TripAdvisor's 2017 top trending travel spots, earned a top spot on Forbes Travel top places to visit, and ranked #7 on U.S. News and World Report as a "best foodie destination."
- The GHCVB (Greater Houston Convention and Visitors Bureau) wants to further boost tourism. Advertising includes a print ad (Texas Monthly) and three commercials; owned and earned media are also included. Specific goals include:
 - Boost Houston's position among key competitors
 - Encourage more people to visit Houston
 - Increase current visitor tourism spending by:
 - Advocating longer trips
 - Motivating travelers to add more visits throughout the year and to take advantage of the large variety of activities/attractions available in Houston.

Growth summary



Growth insights

- GHCVB advertising can concentrate on Texas since the state represents the most critical market for Houston – 65% of its visitors live in Texas (TNS' TravelsAmerica). Next-in-line Louisiana contributes only 10%.
- Houston has a lot on which to build interest and promotions, with residents lauding its many features, such as dining, cultural diversity, shopping, something for everyone, and culture. However, many visitors fervently complain about traffic and weather; some mention dirt as well.
- Three long-running commercials and a print ad yield similar overall paid ad awareness as last year (even without including online ads), further boosted by owned (very high praise for the website) and earned marketing efforts.
- All GHCVB ads enhance viewers' impression of Houston and can entice new travelers to visit.
- The core visitor (female 35-55) has media habits that make them easy to reach; they watch TV dramas and comedies, use the Internet and social media, and listen to the radio.
- However, they are particularly harder than others to reach via print, especially newspapers, and through news shows.

Precise plans for growth

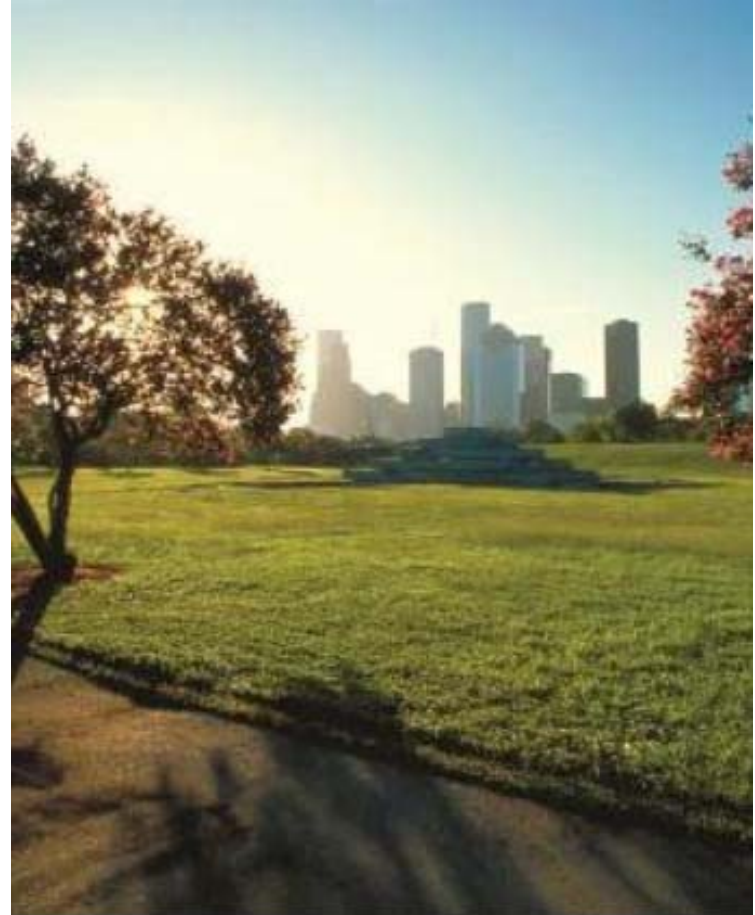
- Hurricane Harvey will add pressure on Houston's tourism as the area recovers, but can be offset with positive media coverage on the cleanup and aftermath. In New Orleans, even with rampant negative press, the most negative reactions to Katrina (2005) had diminished by 2007 (other TNS travel research).
- Meanwhile, maintain focus on large Texas markets within driving distance and add medium-sized Texas markets and nearby cities (such as Waco, Baton Rouge, and New Orleans), as budgets allow.
- Consider ways to address traffic and safety issues that detract from Houston's reputation, recognizing that may involve city infrastructure changes beyond the scope of advertising.
- Continue the arts/cultural and entertainment focus which has wide appeal; the current ad combinations broaden the image of Houston.
- Highlight Houston lovers advocacy with testimonials, blogs, and social media interactions.
- Maintain attention to the already successful and outstanding website.

“It's hot/humid most of the year, but has more to offer – arts/culture – than most people realize.”

Houston is pretty close to First...

- Within a fierce competitive set, Houston is very strong and continues to improve upon the most important image attributes—value and likelihood to return.
- Ads continue to build awareness and favorable impressions in an ever changing and massively overloaded media environment—a tremendous achievement. This achievement is even more impressive when analyzed in relation to Dallas and Fort Worth as each city is distinct and has strong campaigns though the research treated them as a single entity. Future research should isolate these cities in order to better reflect awareness and favorable impression ratings.
- Houston's overall satisfaction levels are steady while satisfaction levels among residents continue to increase. This is no small point as most destinations have lower resident satisfaction levels and usually erode over time.
- Overall, opinion is high and only muted by other Texas residents. This is due to uniqueness of the State of Texas. Most States only have one or two major cities while Texas has five. This results in lower ratings from other Texans as respondents tend to be biased against other State cities. Every other competitor slipped in overall opinion while Houston slipped the least.
- Mega events like the Super Bowl do not typically change overall opinions of destinations drastically as they are point in time events and fade fairly quickly based on past research. However, mega events help to maintain current levels and allow marketers to leverage event equity in the future.
- As stated earlier, Houston is strong on all key measures with respect to competitors. These key measures should be looked at in the context of the competitive set, and only major shifts should be addressed as small increases or decreases are not statistically significant.

2 Executive Summary



Brief abstract

Positive Trends and Results

- Competitively, Houston residents remain strong advocates of their city, with more of them praising virtues such as *dining, cultural diversity, shopping, something for everyone, summer activities, culture/performing arts, nightlife/entertainment, lots to do, tolerance for other lifestyles, good reviews, and hip/fashionable* compared to residents of other Texas cities – plus, the proportion recognizing most of these features is stable or growing
- Houston slips slightly as having *everything looked for in a destination*, behind competitors, but similar to Dallas
- Houston improves *on good value* (trailing only San Antonio). The city remains similar to Dallas on *the overall experience* and *likely to recommend*, and pulls slightly ahead of Dallas (matching New Orleans) on *expecting to return*
- Houston continues to satisfy visitors (63% extremely/very) visitors, especially past year visitors (80%), residents (79%), and non-Texans (67%)
- Spending remains nearly in place (to \$624 from \$633), led by past year leisure overnight visitors and Non-Texans
- Paid ad campaign awareness changes little (30% from 29%, with a similar boost as in the past on owned and earned media (47% from 45%))
- All ads strengthen the impression of Houston and improve consideration of Houston as a future destination
- Targeted Houston visitors (35-55 females) consistently assign equal-to-stronger ratings to features of the ads than non-target visitors.

Paid: TV, print; Owned: Website, Facebook, Twitter, Instagram; Earned: Social media, articles/blogs

Opportunities

- Continue to nurture Texans as potential visitors – Houston tourism depends on them with two-thirds (65%) of Houston visitors living in Texas (from TravelsAmerica). Louisiana ranks as a very distant second, with 10% of visitors from there; several states vie for third (2-3%).
- Among Texas visitors, Houston compares favorably with other Texas areas, luring more visitors than other large cities except for Dallas. However, it should be noted that Dallas also comprises Fort Worth based on how the research was conducted. (17% visited Houston; 20% Dallas, 13% Austin, and 12% San Antonio)
- With San Antonio and Austin taking the lead on “everything you want in a leisure destination,” Houston should continue to punctuate advertising messaging with the strengths of the city – which it does – in order to broaden interest.

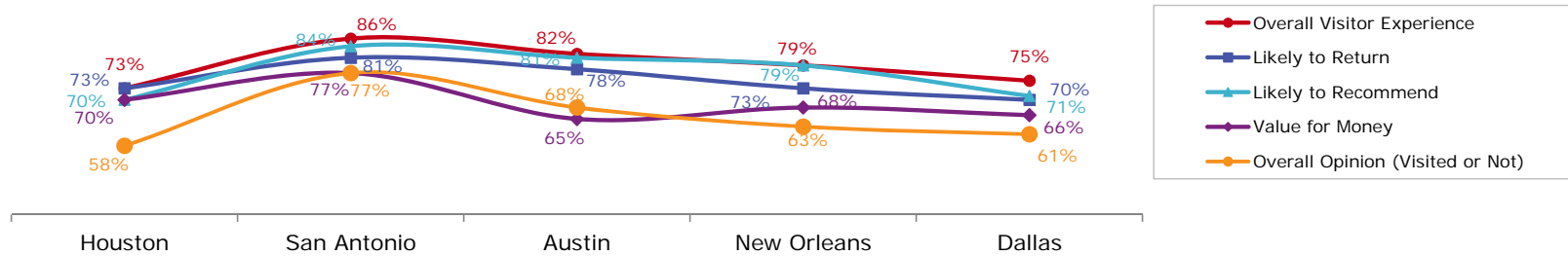
“Next time I visit a friend (in Houston), I want to see things along the water. The ads showed me that there is more to see in Houston than I have seen.”

“I love Houston; it is truly my favorite place.”

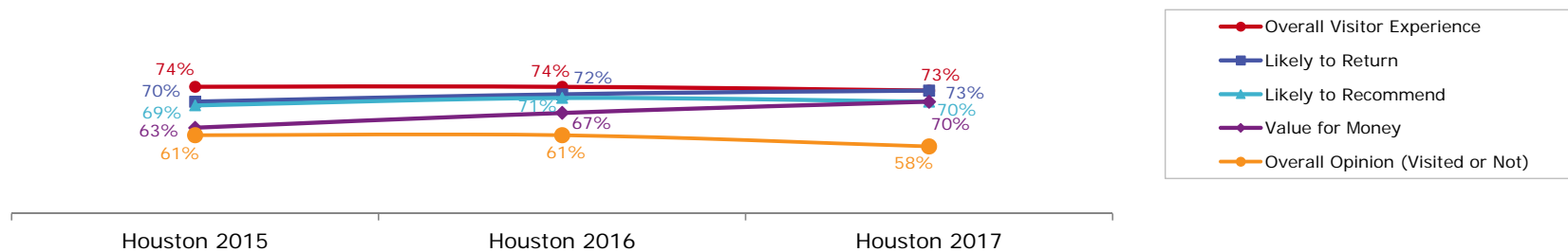
“Houston Roxxxxxxx!!!!”

Houston maintains a moderately competitive standing among nearby destinations especially Dallas though Dallas included Fort Worth based on how the research was conducted. If Dallas was tested in isolation, it may have finished last instead of third.

- San Antonio sets the standard in image; Houston performs most competitively on value for money:



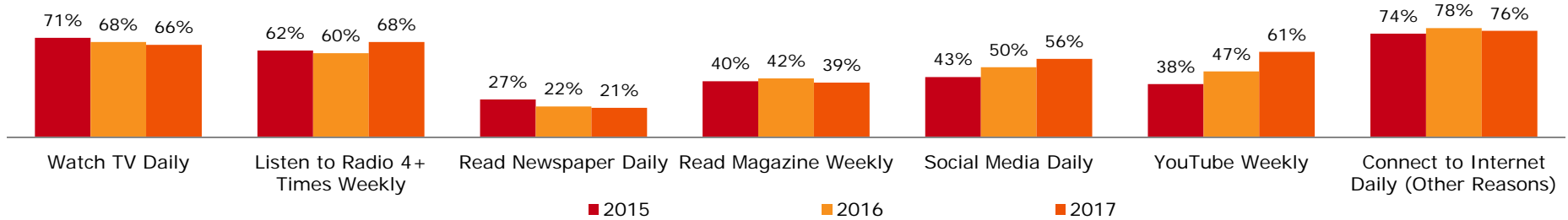
- Generally stable, Houston climbs on value for the money and dips on overall opinion:



Advertising still hinges on television and the internet

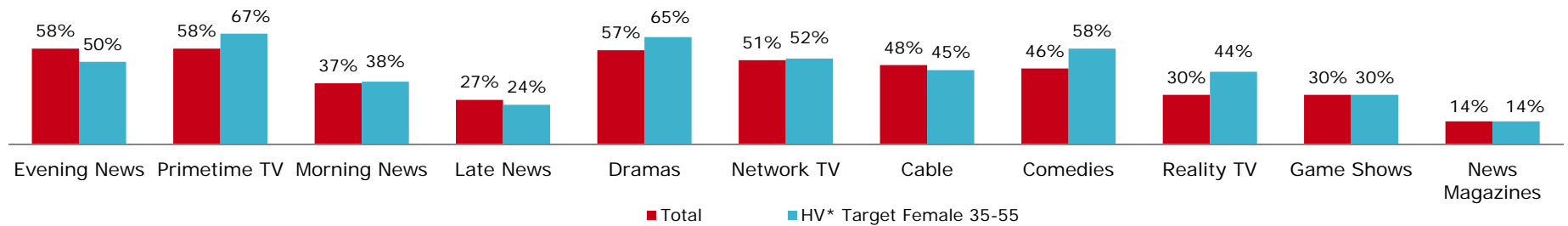
- Still important, TV viewing slowly ebbs as digital (social, YouTube) rises:

Past Year Overnight Houston Leisure Visitor



- In looking at ad placement, the core Target Market, i.e., Female Houston Visitors 35-55, prefer dramas and comedies to other programming; more of them also watch reality TV and primetime TV while fewer watch late or evening news than other groups:

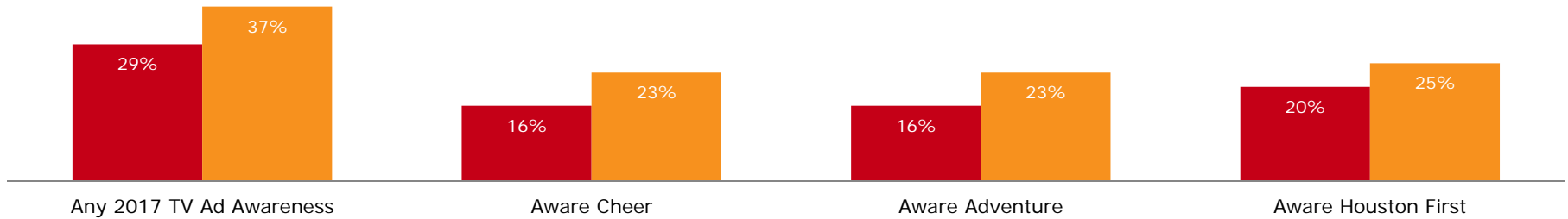
All Viewers vs. Core Market



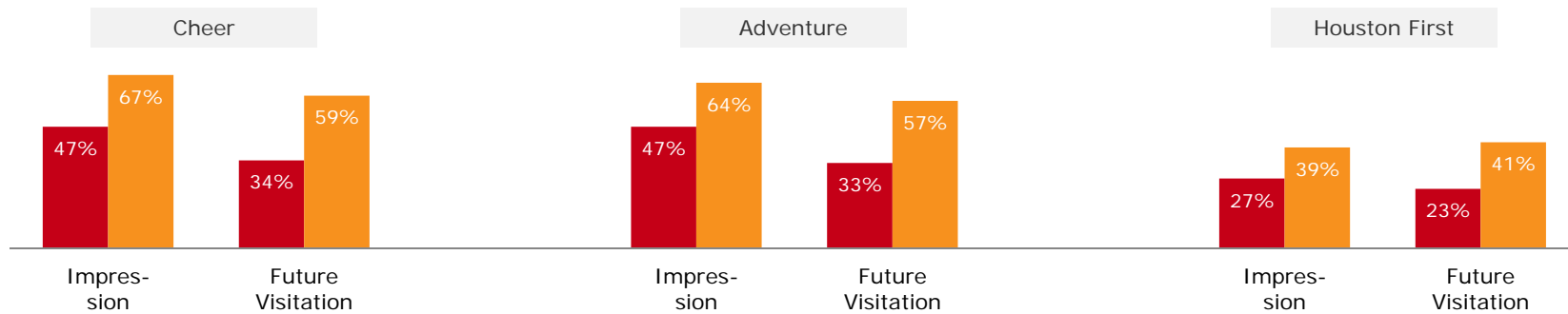
Over a quarter have seen the Houston TV ads; the longer-running, and presumably more familiar, Cheer and Adventure ads still show more positive reactions than Houston First

Awareness of Specific Houston CVB TV Commercials

■ Total Houston ■ Past Year O/N Ls HV*



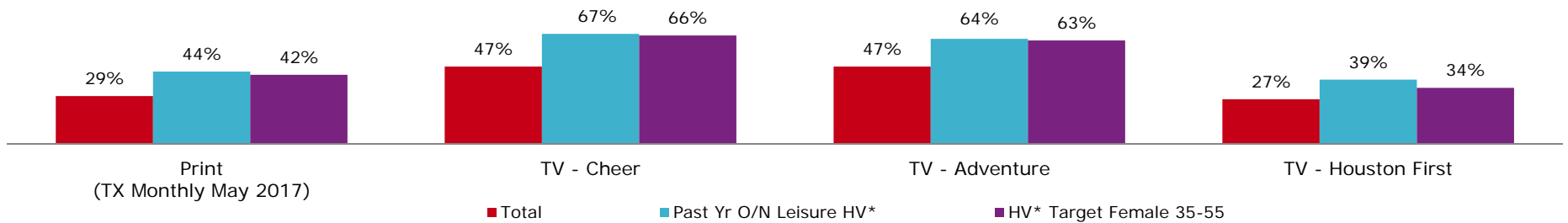
Summary of Opinion/Reaction to Houston CVB TV Commercials (Top 2 Box)



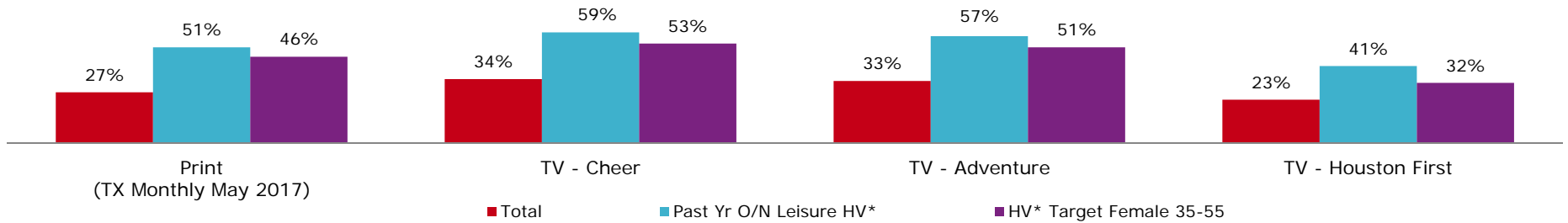
HV= Houston Visitor
O/N = Overnight

All ads build a favorable impression of Houston and boost the likelihood for a future visit

Based on Ads, Change in Favorable Impression of Houston (Top 2 Box)

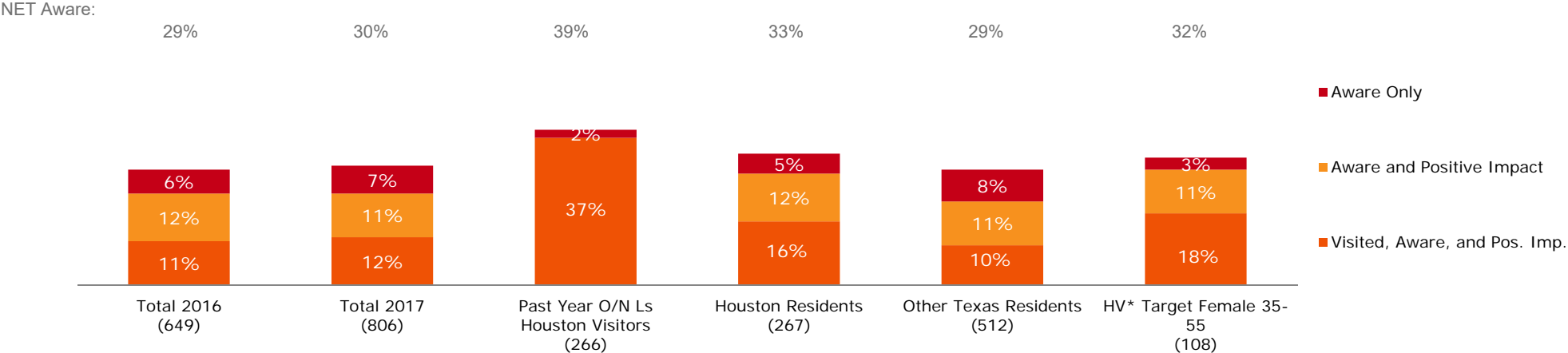


Based on Ads, Likelihood to Take (O/N Leisure Trip to Houston in the Future (Top 2 Box)



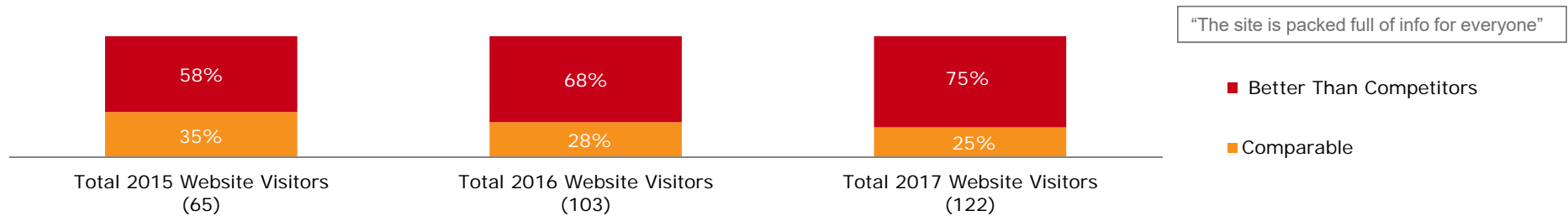
HV= Houston Visitor
O/N = Overnight

Ad recognition gains slightly from last year with the majority of (aware) viewers noting at least some positive impact from them

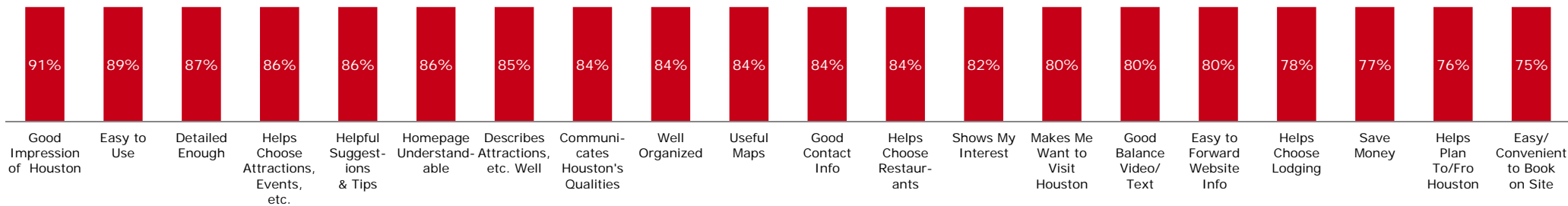


The website helps promote Houston and gets continually higher marks for quality

- Users of the Greater Houston CVB Website praise it. No one (2017) views it as worse than competitors and three-quarters deem it better than competitors:

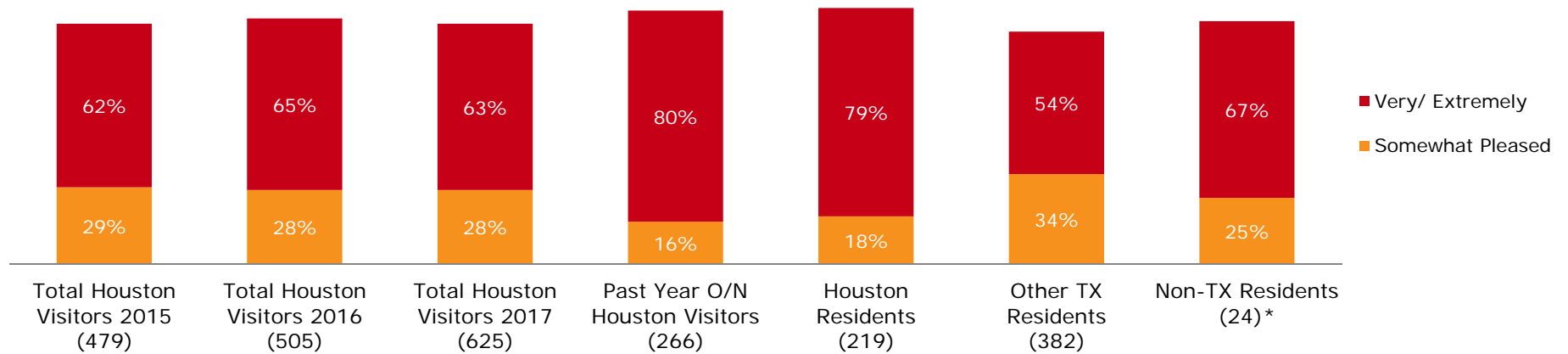


- The website delivers, with three-quarters or more saying they agree that it (is/has/provides) ...



Houston generally satisfies visitors

- And that satisfaction helps build a strong “word-of-mouth,” whether literally (in-person), online (blogs, recommendations), or via social media. Texans outside of Houston have historically been more critical than others, perhaps viewing their own Texas city as superior.



Comments regarding Houston

- Travelers often commend Houston as a travel destination, but many complain about the weather, traffic, and safety. Supportive comments center around its diversity, attractions (museums, shopping, entertainment, etc.), and food.

Comments regarding Houston: 2017

Negative

"Houston has the worst traffic of any city I have ever visited; virtually gridlock 24/7."
"A big city that radiates no charm or personality."
"Way too humid and hot for my family to visit."
"Houston is polluted, extremely overpopulated, and the people unfriendly."
"I have never been to Houston, but it is known for a high crime rate."
"Traffic and road construction are SO horrible. So hot and humid from June - September."
"Unpleasantly humid in the summer and the traffic is horrible."
"It's OK for a pass-through, but not for me as a destination; it's overpriced and overblown."
"It's a dirty pit, it's hot, and it's hot gang-wise."
"Much too much traffic that drives too fast, truckers are rude about letting people change lanes, and so many lanes of traffic to try to keep up with while looking for signs to change highways."
"Air smells like dead fish, especially the east side, traffic is horrid, and too many bad neighborhoods."
"Traffic is awful, people on the road are rude, prices are higher than ever."
"Too crowded and hot and humid and polluted."
"Too hot and muggy; drivers are maniacs."
"Too hot, even for a Texan."
"Too much traffic, too HOT and HUMID, too much crime from the sanctuary city declaration. Too gay and LGBTQXYZ-ish."
"Way too many people. Traffic is horrible; downtown isn't safe, and they promote gay lifestyle. Hell will freeze over before I go to Houston for leisure."
"Houston is a solid place to live with low taxes and affordable housing, but not a place I'd vacation to. Downtown is a dump and has limited things to do besides sporting events."

Positive

"The diversity of cultures, foods, activities, and lifestyle is endless."
"It's good to know about other things available in Houston; we were there to see NASA."
"GREAT SHOPPING."
"Great restaurants and great sport venues."
"Houston is a great and culturally diverse place, full of fun family places, great places for couples, or just adventuring adults. The museums are great!"
"Houston is a very busy place and I usually like quieter, more restful, vacations, but it's fun to visit for a short trip. So much to see, do, eat, etc."
"I visit a friend in Houston. Next time I go, I want to see things along the water. The ads showed me that there is more to see in Houston than I have seen."
"I love Houston; it is truly my favorite place and there is lots to see/do. I wish I could walk around downtown and not have to work all the time because downtown is the place to be!!!"
"I love the city pass option ... a lot of fun."
"Fantastic museum district, wide variety of restaurants and cultural experiences. Tons of parks and other outdoor attractions are perfect for kids and adults!"
"Nice place to visit, people are friendly/helpful, and the food is affordable."
"Love the ads and VisitHouston.com website. Very friendly, very personable, culturally diverse."
"After seeing these ads, it makes me want to take an extra day in Houston and look around."
"Houston Roxxxxxx!!!!!!!"
MIXED COMMENTS:
"I grew up there and I think the food is some of the best; however, the weather is harsh in the summer and it is very spread out, so you need a plan to avoid being in the car the whole time."
"Houston has a remarkable tunnel system that is almost never used to promote travel there."
"I like Houston for shopping and eating out, but traffic is terrible. I hate driving through Houston."
"I wish the ads showed more of Houston's diversity -- the rich Asian, Mexican, and Indian areas."
"It's hot/humid most of the year, but has more to offer -- arts/culture -- than most people realize."

Q32. Please share below any additional comments you may have regarding Houston, TX as a travel destination?

3

Appendix: Detailed Findings



4

The Landscape

Topics:

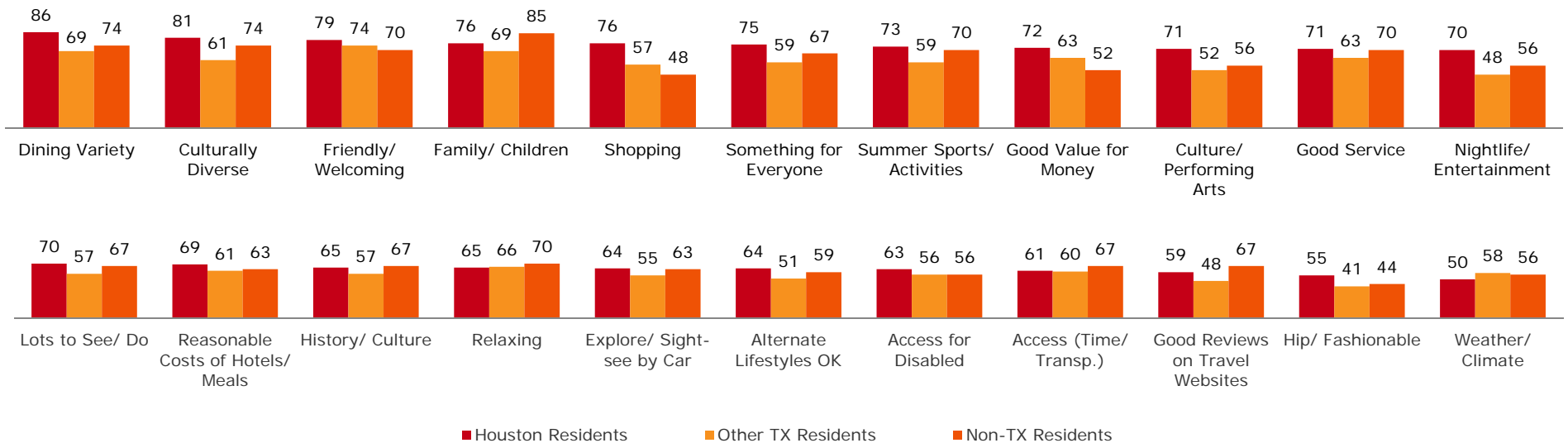
How Houston compares to other cities
View of Houston: Residents vs. others
Progress over time



Houston's own residents can be great ambassadors

- Houston residents usually deem Houston as above average, compared to other cities by their residents. They see Houston as an active urban playground, well-above (10+%-points) other Texas cities for cultural diversity, shopping, something for everyone, summer activities, culture/performing arts, nightlife/entertainment, lots to do, alternative lifestyles, good reviews on travel websites, and hip/fashionable.

Attribute Description of City by Residents (% Top 2 Box)
Ranked by Houston Residents

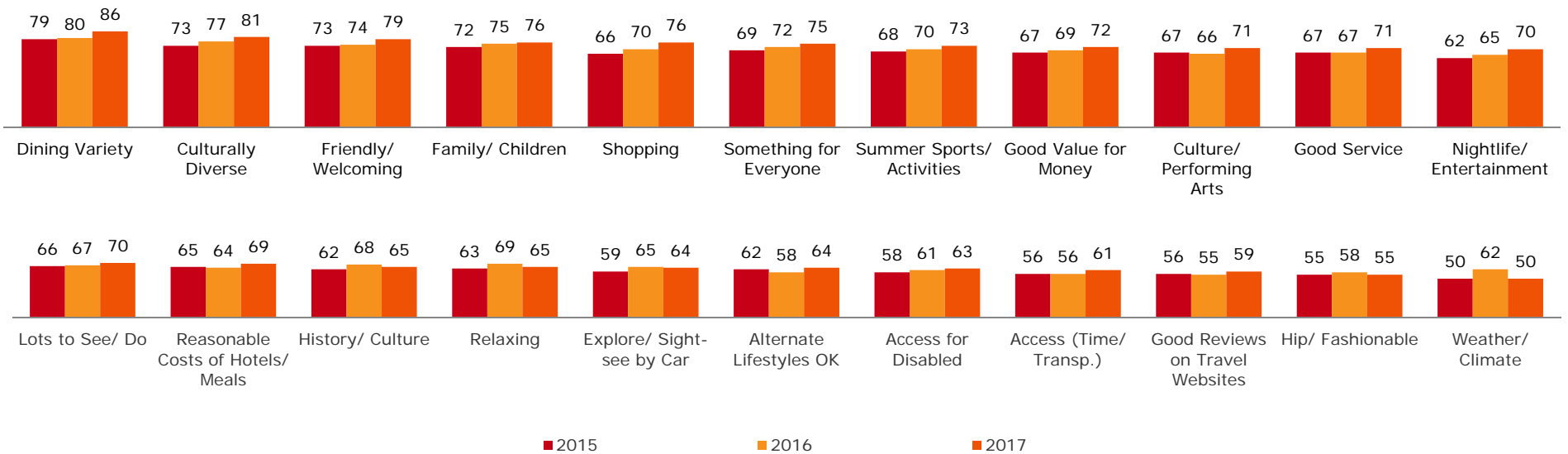


Q3. Thinking about the city where you live, how well does each statement describes your city as a leisure destination for those who do not live there (5 point scale).

Over time, Houston residents see steady improvement

- Most descriptions steadily improve, especially: cultural diversity, shopping, and nightlife/entertainment.

Attribute Description of Houston (% Top 2 Box)
Houston Residents (Ranked by 2017)

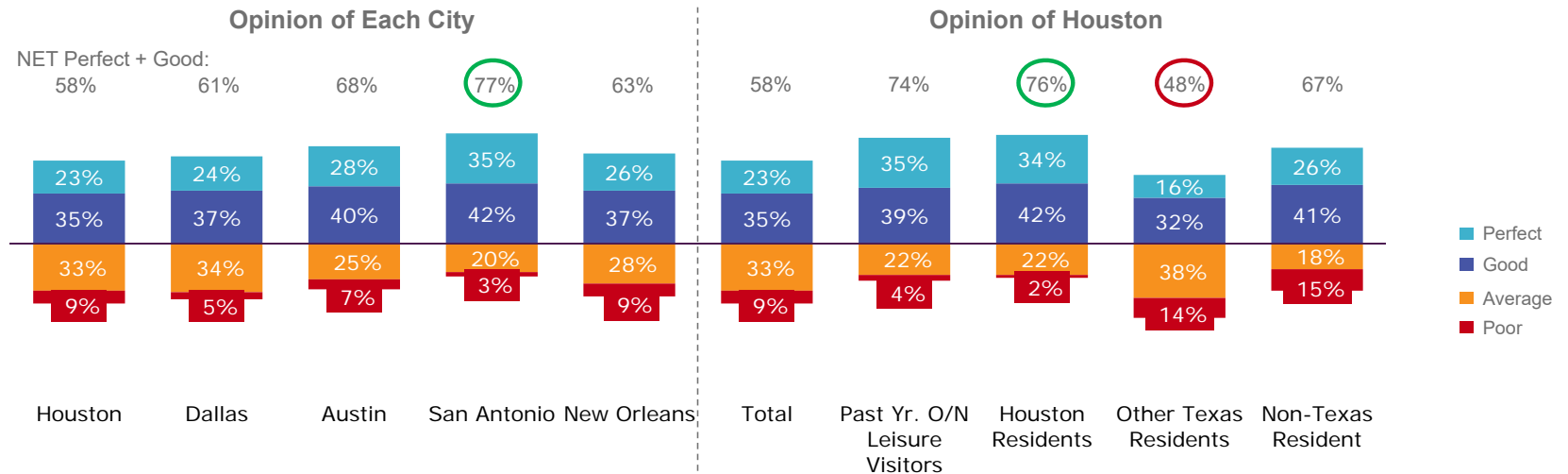


Q3. Thinking about the city where you live, how well does each statement describes your city as a leisure destination for those who do not live there (5 point scale).

San Antonio continues to set the bar for everything you look for in a destination (overall opinion)

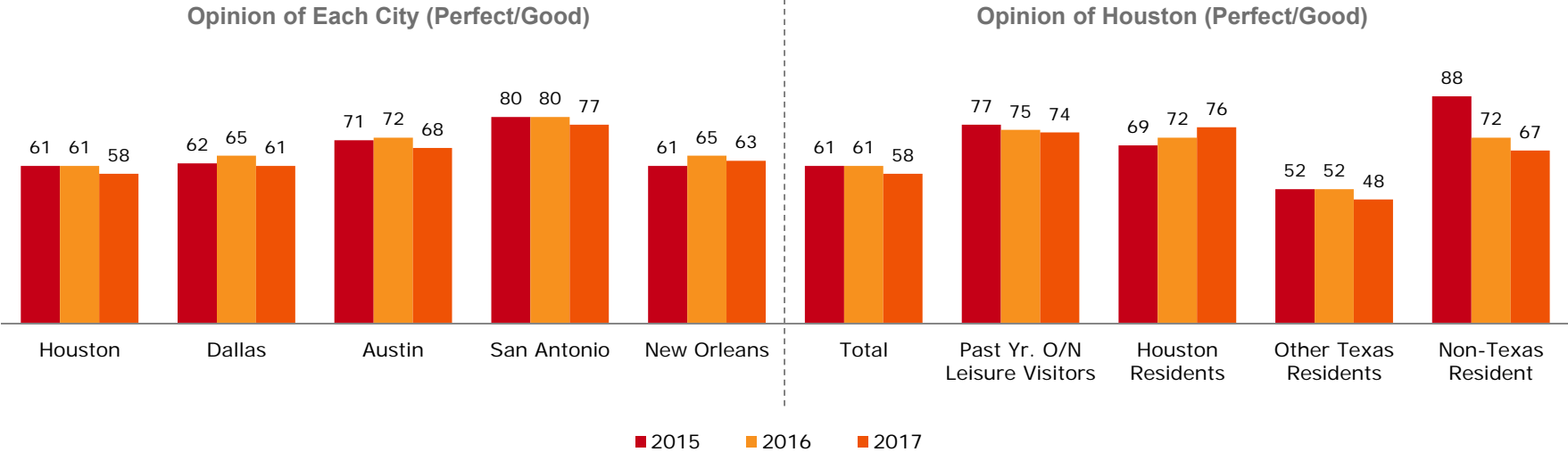
Meanwhile:

- Houston, Dallas, and New Orleans continue to lag San Antonio and Austin. Though Houston is slightly behind Dallas, it needs to be pointed out that Dallas also comprises Fort Worth based on the research was conducted. As such, Dallas may have a lower opinion score if tested in isolation than Houston.
- Non-Houston Texas residents continue to view Houston most critically.



Q4. Now, please rate each city, whether or not you live there or have visited it, taking into account everything you look for in a leisure destination (10-point scale).

Trend: Every destination city slips slightly from last year, but Houston gains among its residents



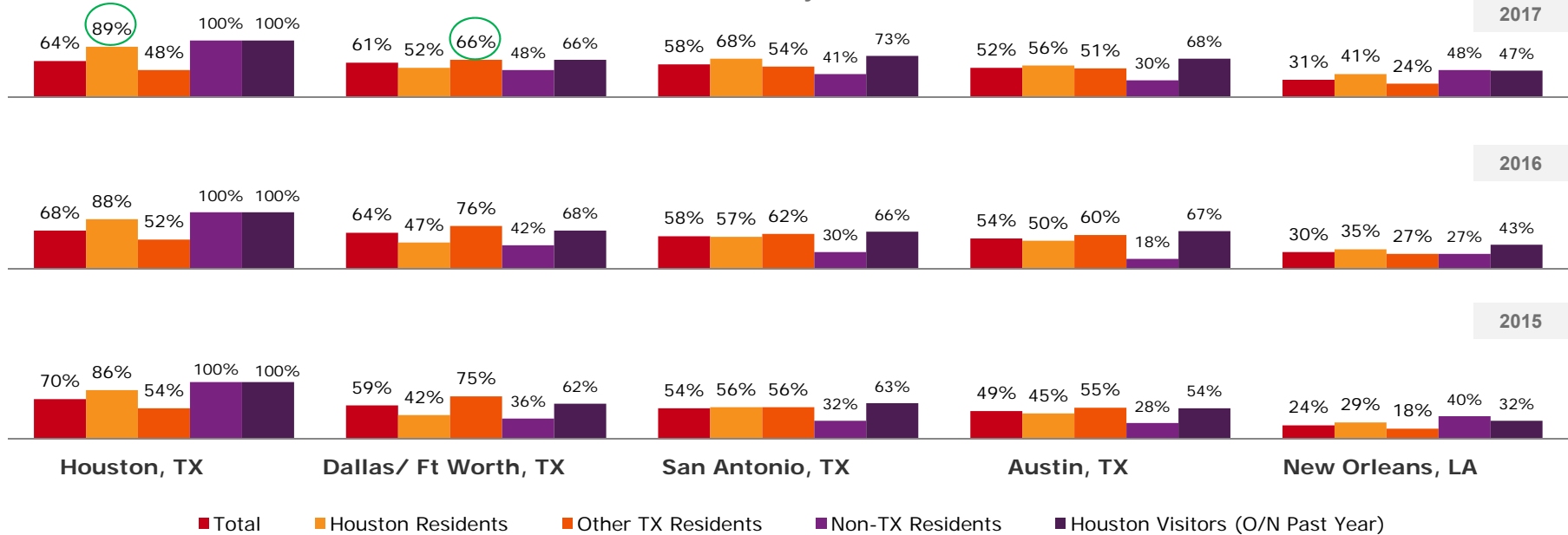
Q4. Now, please rate each city, whether or not you live there or have visited it, taking into account everything you look for in a leisure destination (10-point scale).

More Houston residents visit their home city than visit any competitor; they visit San Antonio next-most-often

Other patterns:

- Past year overnight Houston visitors also visit Dallas, San Antonio, and Austin nearly equally
- More non-Houston Texas residents visit DFW than any other of these cities.

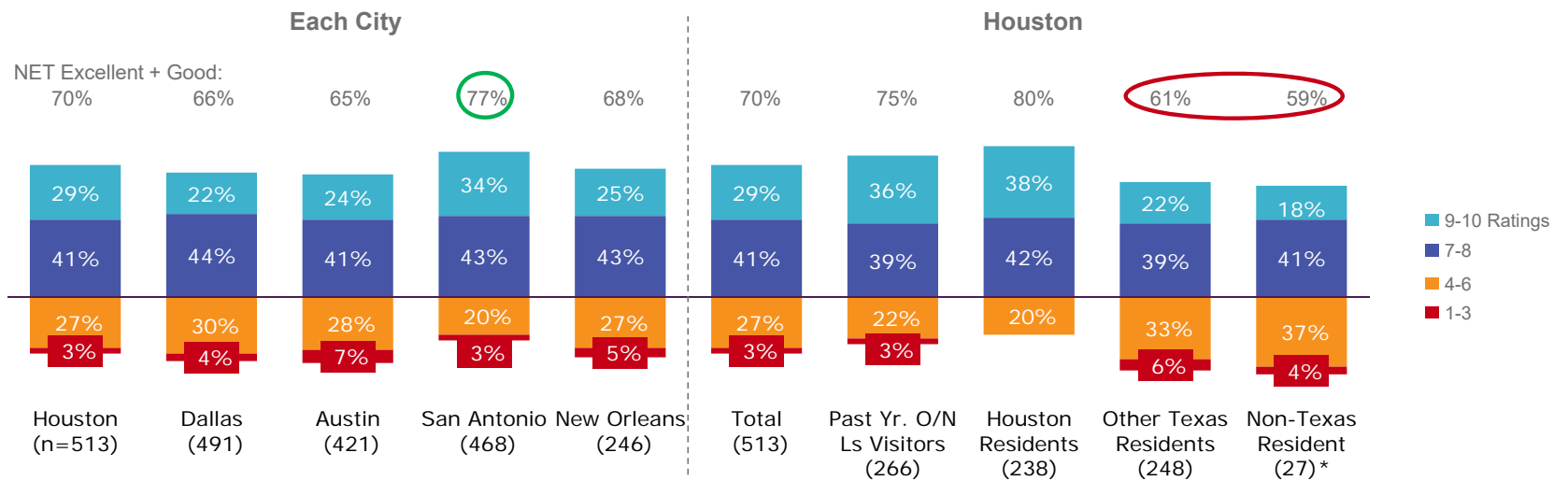
Cities Visited
Ranked by Total



Q5. Which of the following cities have you visited in the past 5 years?

The majority of visitors deem Texas destination cities as good value for their money

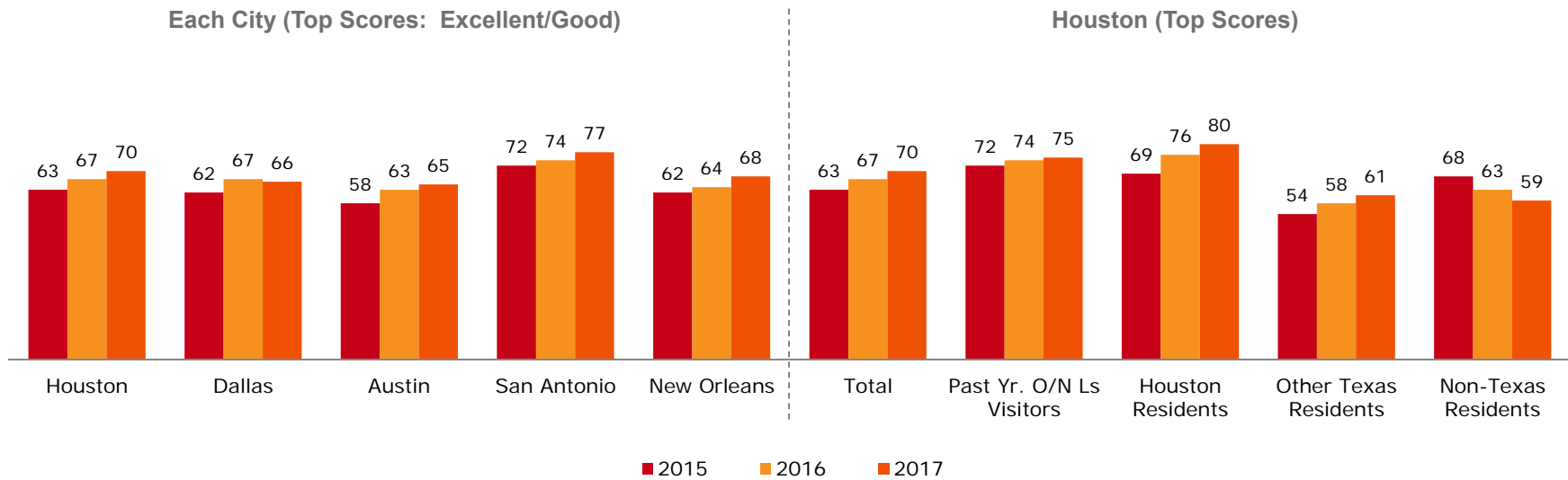
- San Antonio continues to lead, the remaining cities challenge each other for second place; Houston has a slight edge
- Non-Houston residents view Houston less favorably than others.



Q6. How would you rate the value for the money of each city (10-point scale)?

Trend: Houston's value for the money image improves, now in second place (after San Antonio)

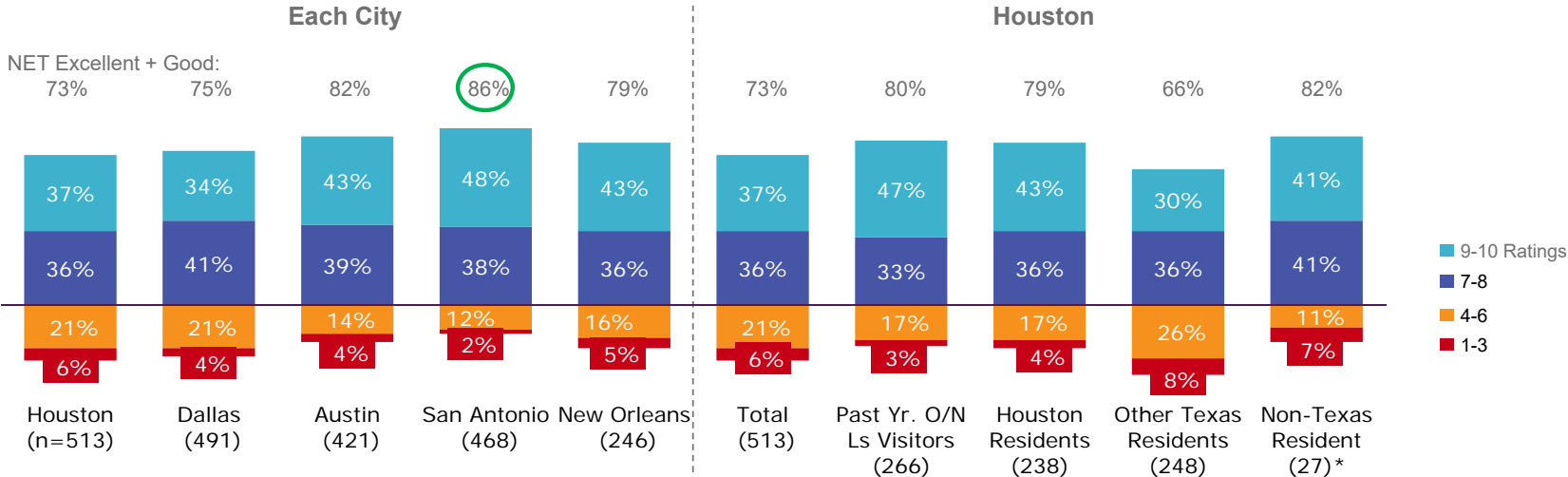
- Except for Dallas, every city posts a gain over last year
- Only non-Texans (small sample) note a decline for Houston from last year.



Q6. How would you rate the value for the money of each city (10-point scale)?

Visitors still vote San Antonio as the city with the best overall experience

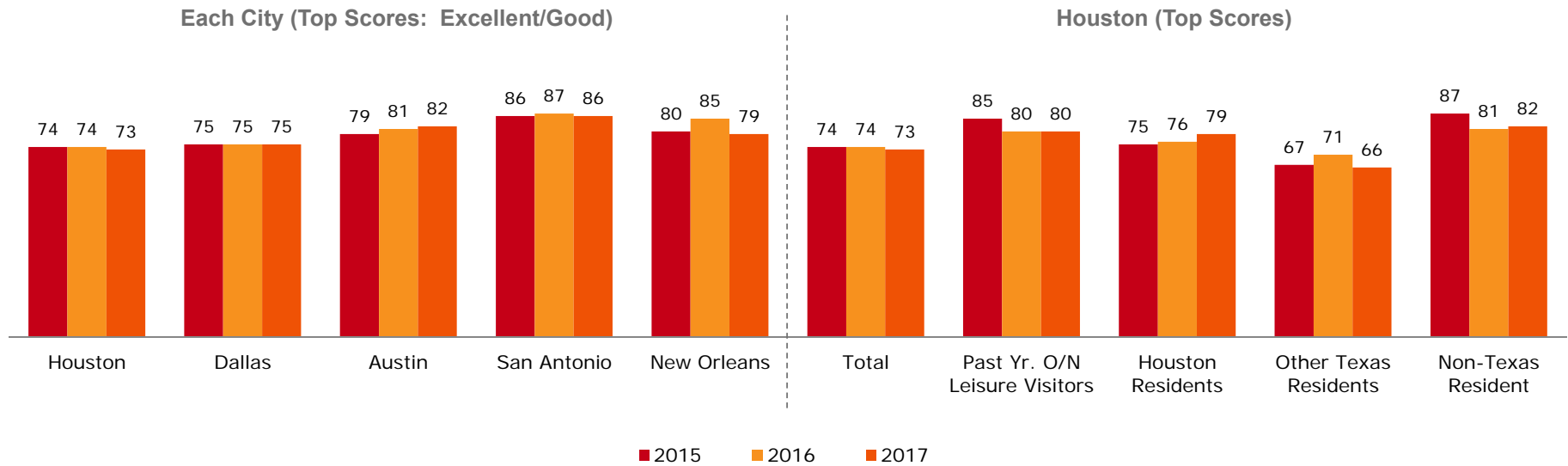
- New Orleans and Austin vie for second place
- Houston and Dallas nearly match, and although they rank last among these cities, still three-quarters of visitors give them high marks.



Q7. Overall, how would you rate the experience you had in each city (10-point scale)?

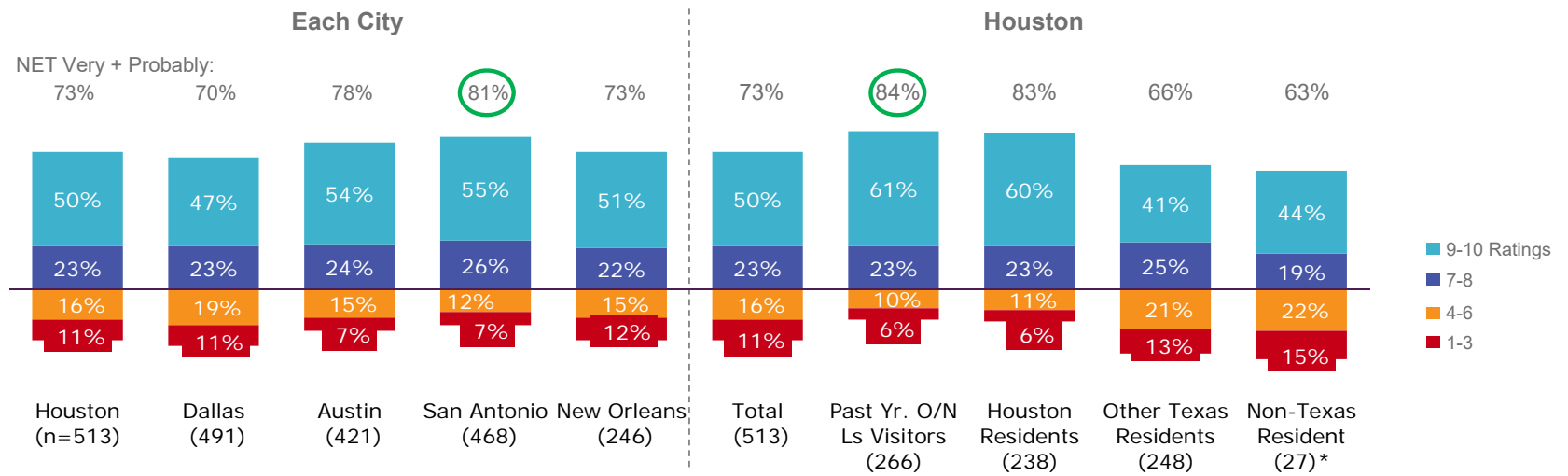
Trend: The experience in each destination city remains similar to the past

- As stated on the last slide, Houston and Dallas nearly match on their experience ratings. If Dallas was tested in isolation without including Fort Worth, Dallas may score lower on the experience ratings than Houston.



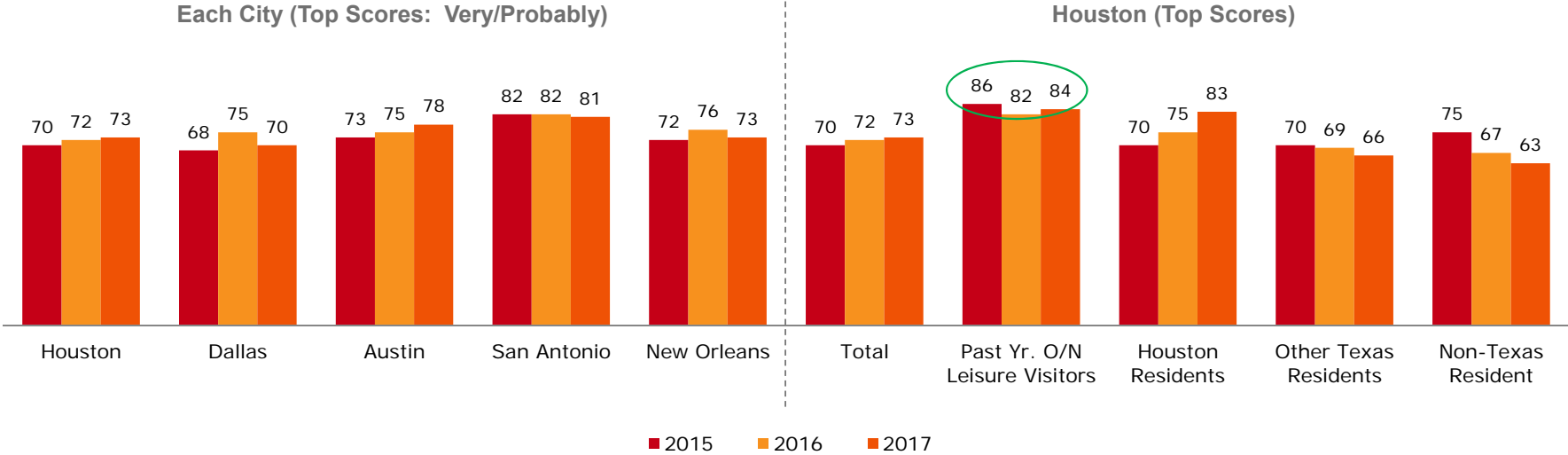
Q7. Overall, how would you rate the experience you had in each city (10-point scale)?

More San Antonio visitors expect to return than visitors to other cities; Houston exceeds Dallas and matches New Orleans



Q8. How likely are you to return to each city for an overnight, leisure trip, if visited (10-point scale)?

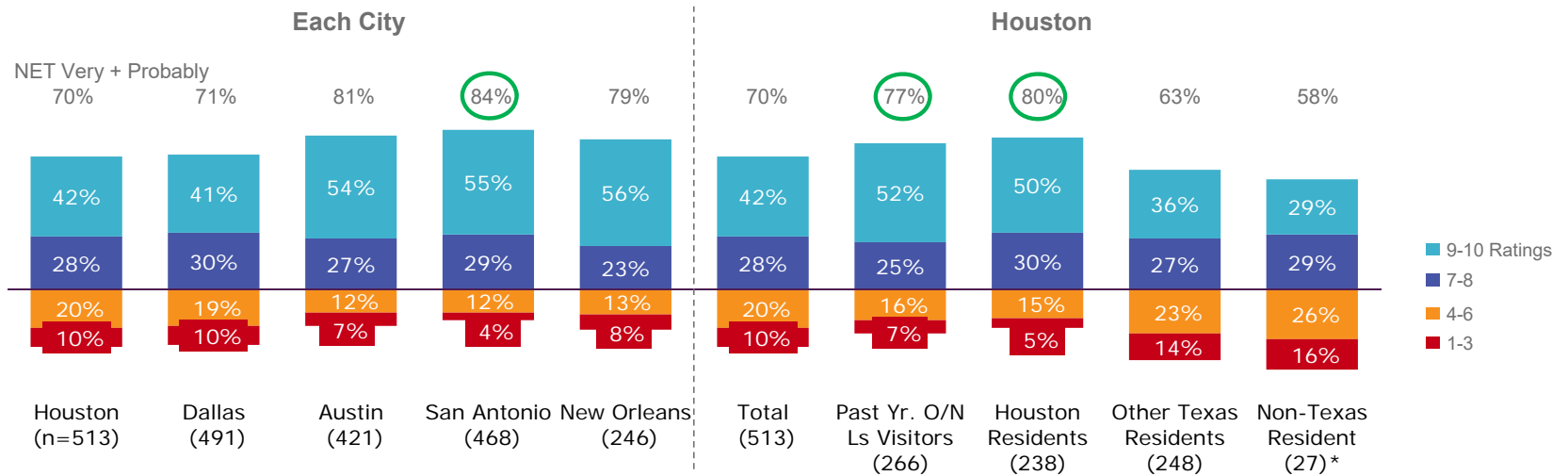
Trend: Expectations to return to these five cities hovers near prior years, with Houston and Austin showing slow, but steady, improvement



Q8. How likely are you to return to each city for an overnight, leisure trip, if visited (10-point scale)?

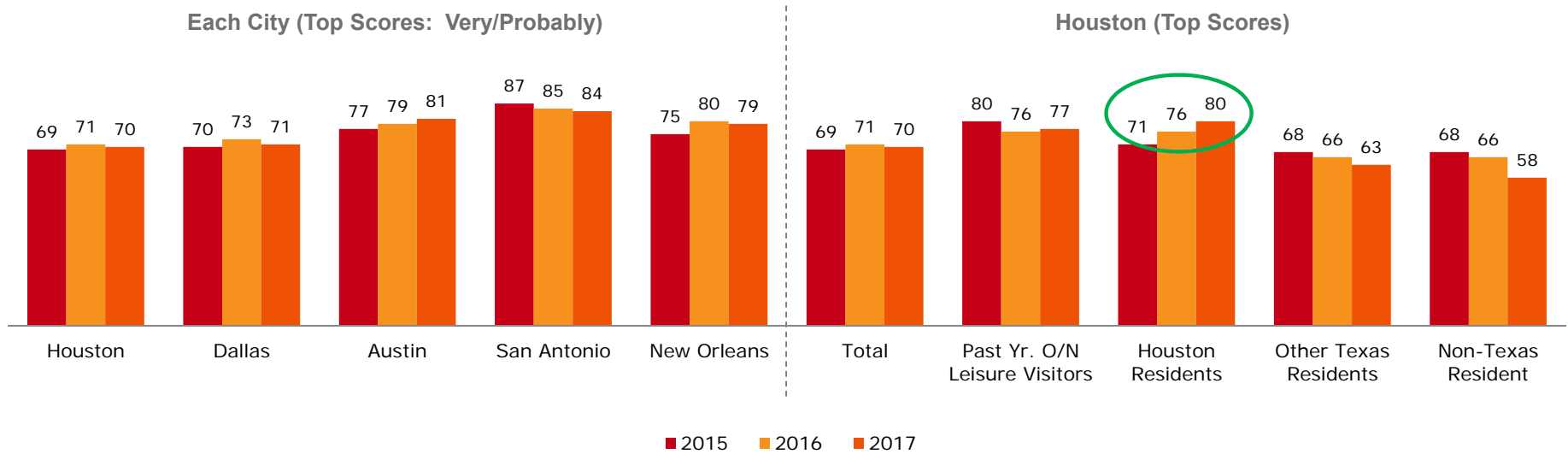
San Antonio wins as the city to recommend

- New Orleans and Austin visitors vie for second place
- Houston and Dallas essentially tie statistically though Dallas and Fort worth were treated a single entity.
- Past year visitors and Houston residents hail Houston.



Q9. How likely are you to recommend traveling to each city to friends/family (10-point scale)?

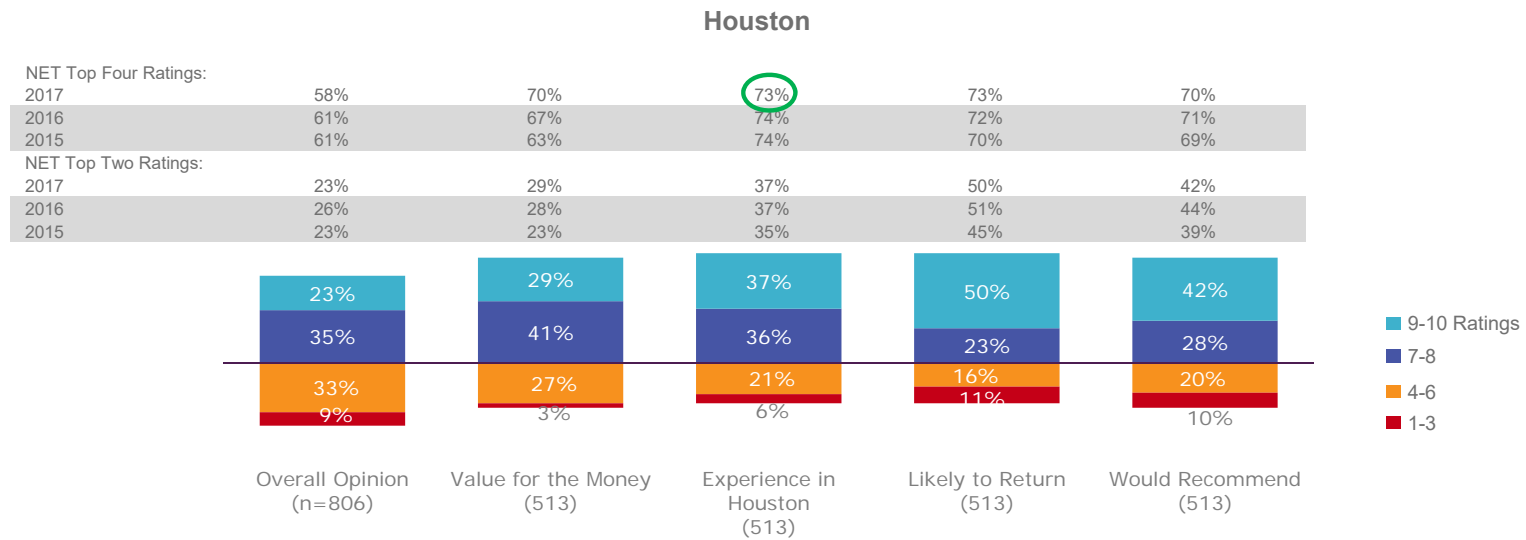
Trend: Likelihood to recommend each city hovers near prior levels, climbing a bit for Austin and slipping a bit for San Antonio; Houston residents increasingly favor their city



Q9. How likely are you to recommend traveling to each city to friends/family (10-point scale)?

Summary of opinions/ratings about Houston

- Generally level with the past two years, the majority (58%-73%) of Houston visitors (past 5 years) praise the city, especially for providing a positive experience (73%) and expect to return (73%).

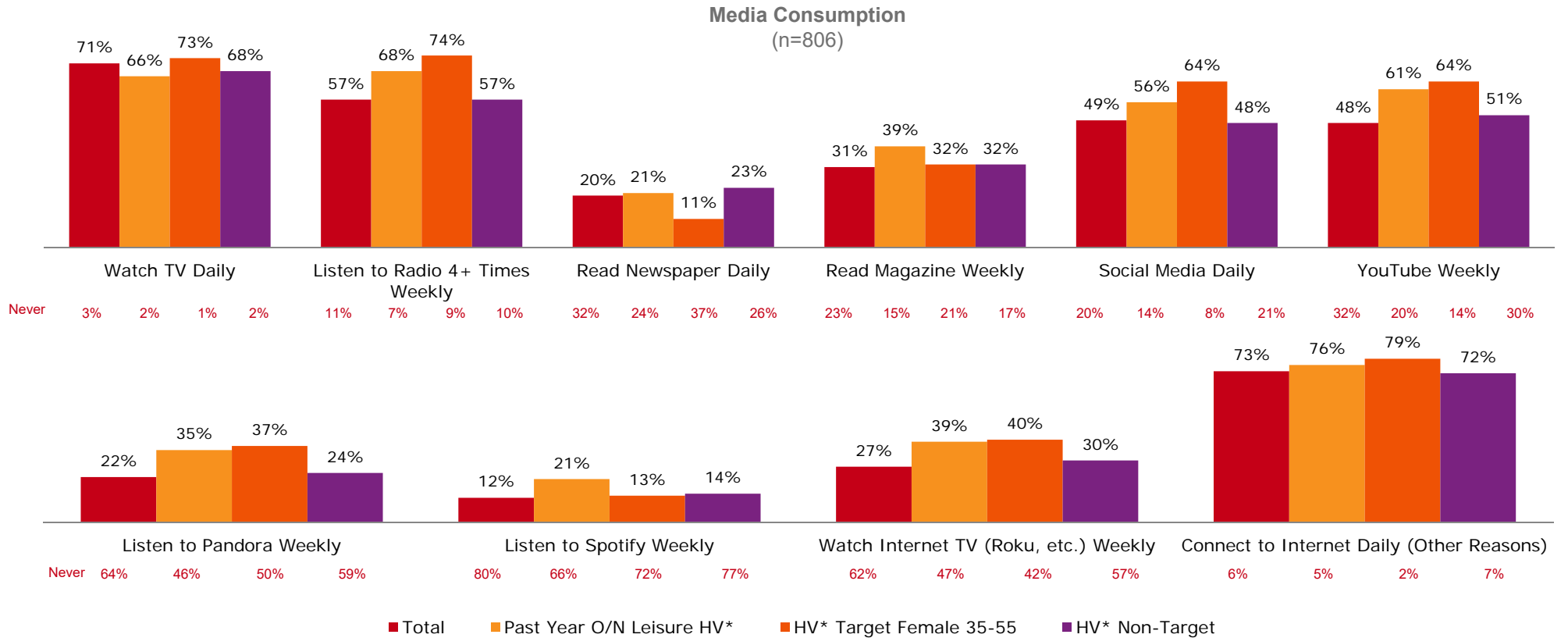


- Q4. Now, please rate each city, whether or not you live there or have visited it, taking into account everything you look for in a leisure destination (10-point scale).
 Q6. How would you rate the value for the money of each city (10-point scale)?
 Q7. Overall, how would you rate the experience you had in each city (10-point scale)?
 Q8. How likely are you to return to each city for an overnight, leisure trip, if visited (10-point scale)?
 Q9. How likely are you to recommend traveling to each city to friends/family (10-point scale)?

5
Media Choices



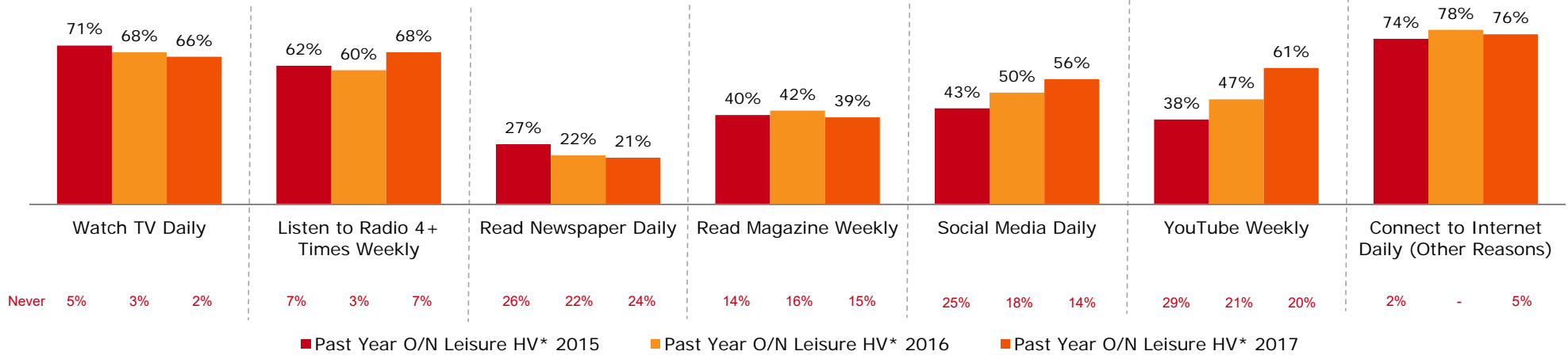
Media: Almost everyone watches TV (97%) and connects to the Internet (94%), most daily



HV* = Houston Visitor
Q38. How often would you say you do each of these activities?

Media trend: Still a daily function for most, TV viewing steadily erodes and newspapers also decline; YouTube, social media, and radio climb from last year

Past Year Overnight Houston Visitor Media Consumption
(n=266)

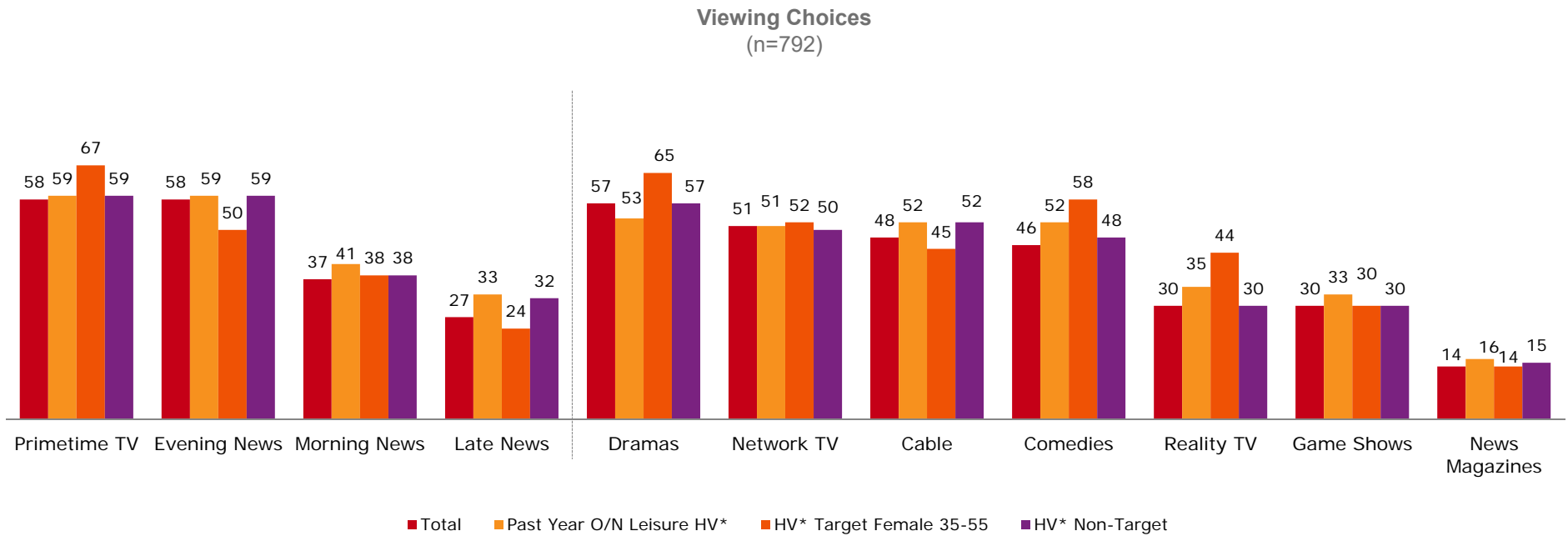


Note: Pandora, Spotify, and Internet TV new; not shown for trending; 2017 for YouTube also includes Hulu and Netflix

HV* = Houston Visitor
Q38. How often would you say you do each of these activities?

Viewing choices: Target visitors prefer dramas, comedies, and reality TV more than other groups

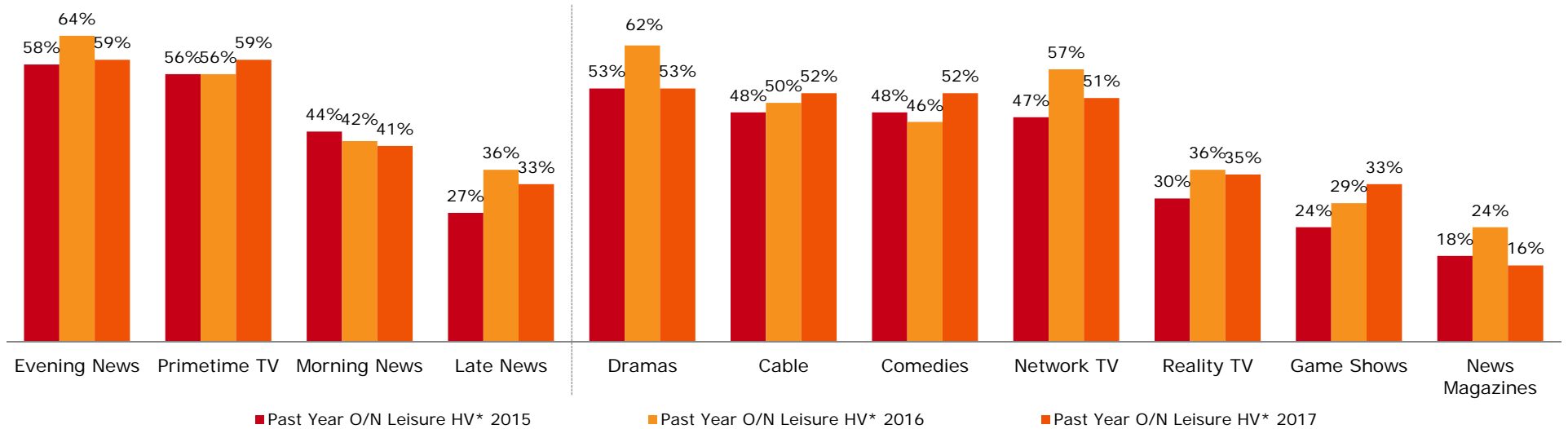
- To counter that, fewer of them prefer evening and late news programs than non-target visitors.



HV* = Houston Visitor
Q40. What do you watch?

Viewing choices trend: Patterns tend to stay near the past; a few that spiked last year (Evening News, Dramas, Network TV, and News Magazines) return to prior levels

Past Year Overnight Leisure Houston Visitors: Viewing Choices
(2017 n=264)

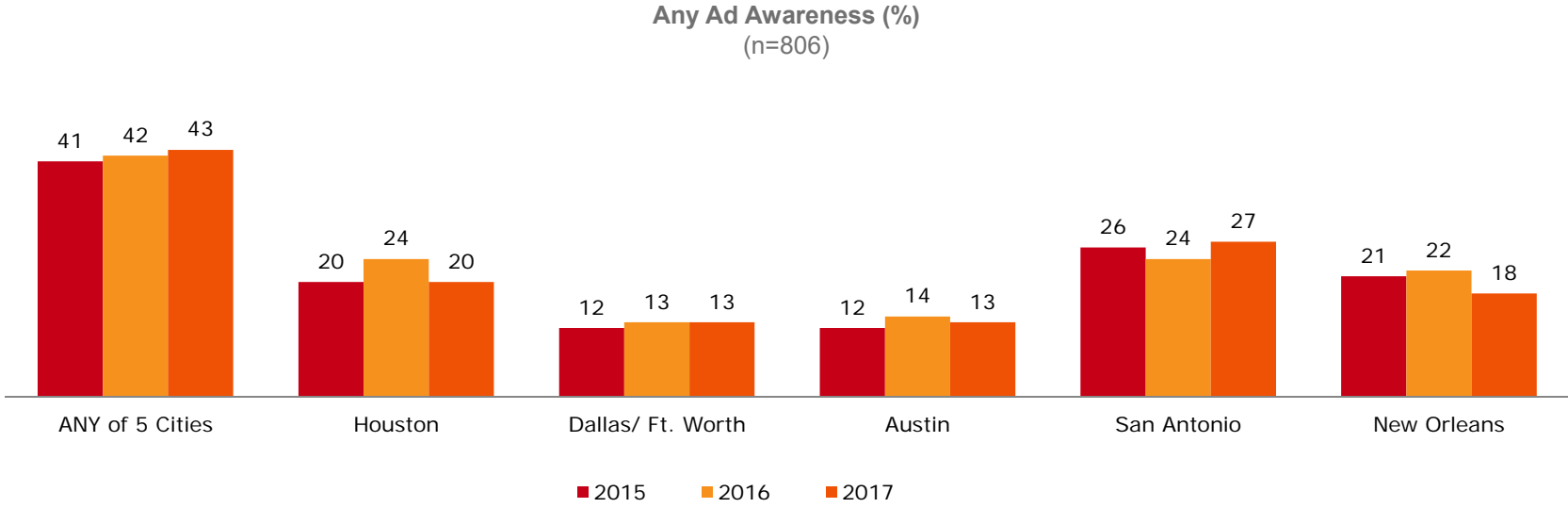


HV* = Houston Visitor
Q40. What do you watch?

6
General Advertising Awareness

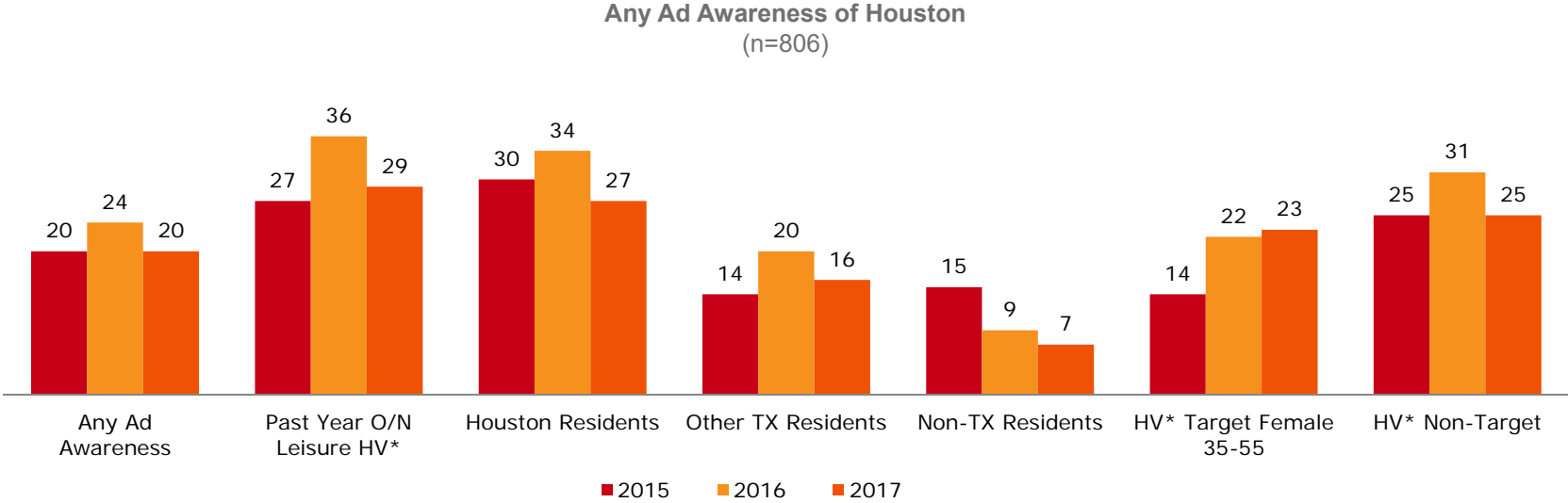


Although slipping from last year, Houston still ranks second (behind San Antonio) in ad awareness



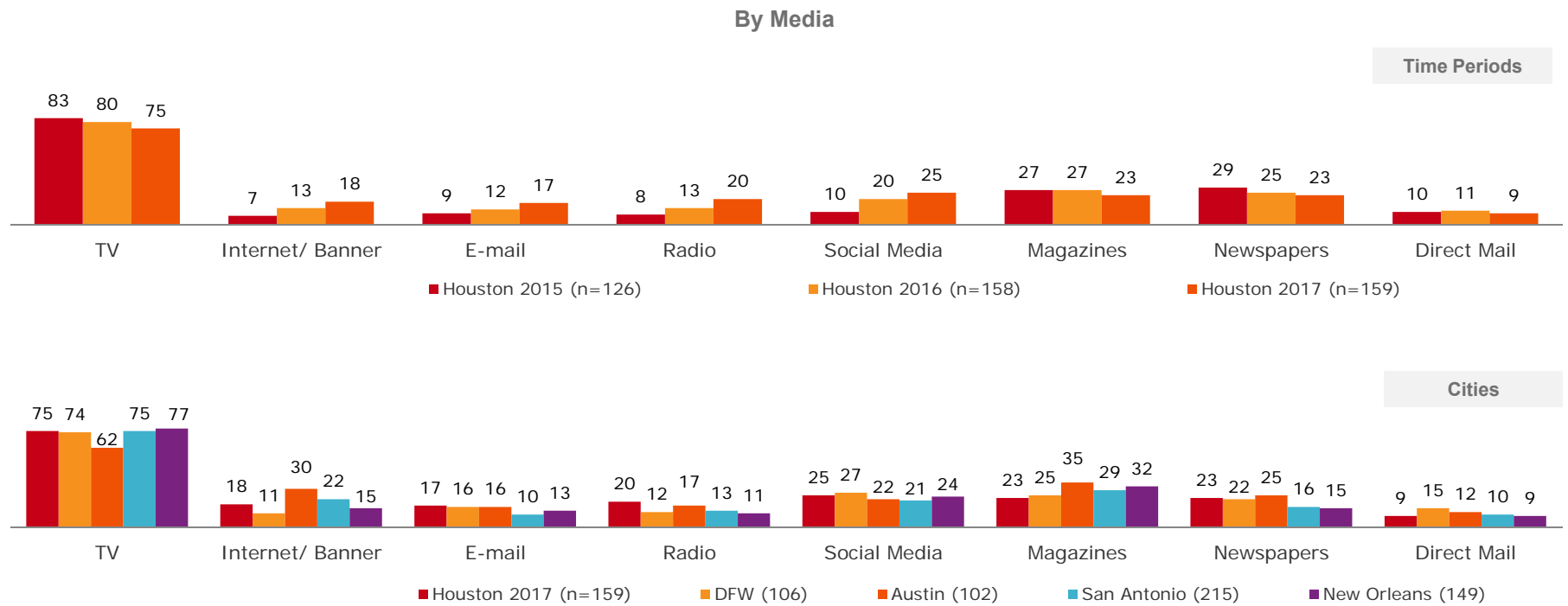
Q11. In the past 3 months, for which of the following cities have you seen advertising?

The dip after last year's spike in unaided Houston ad awareness occurs almost universally – only the target group exceeds last year



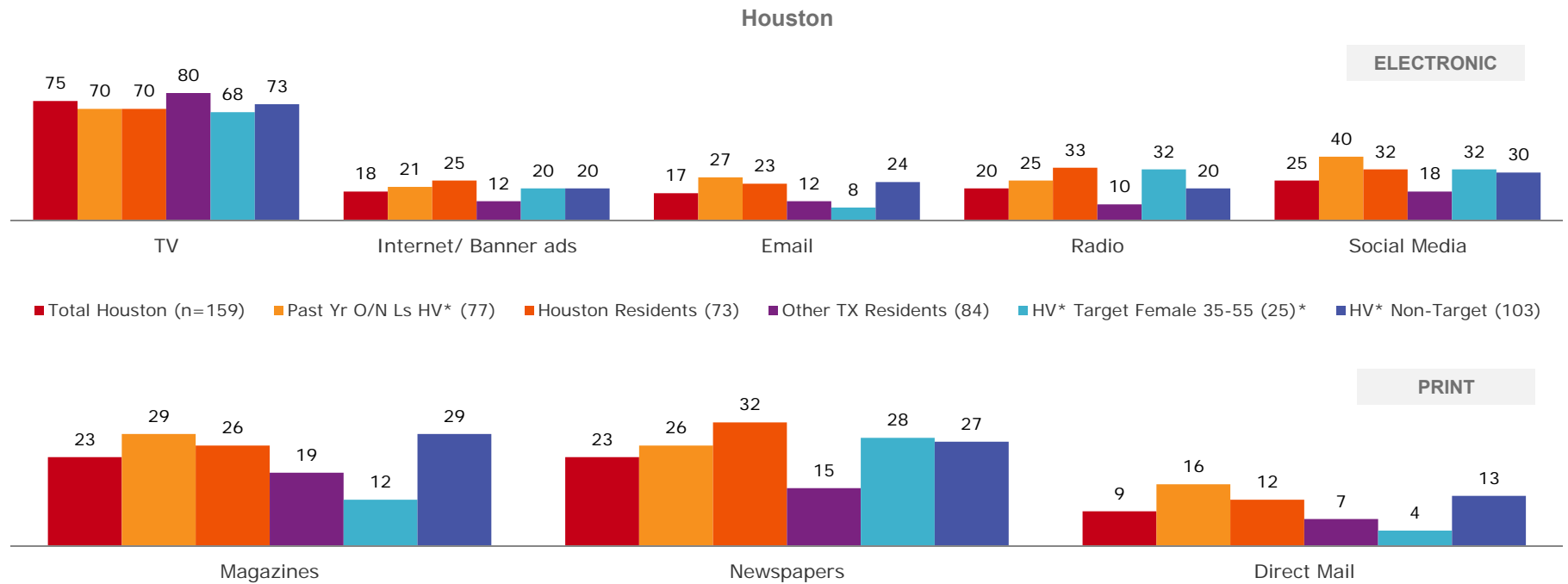
HV* = Houston Visitor
Q11. In the past 3 months, for which of the following cities have you seen advertising?

For unaided media awareness, TV dwarfs other sources



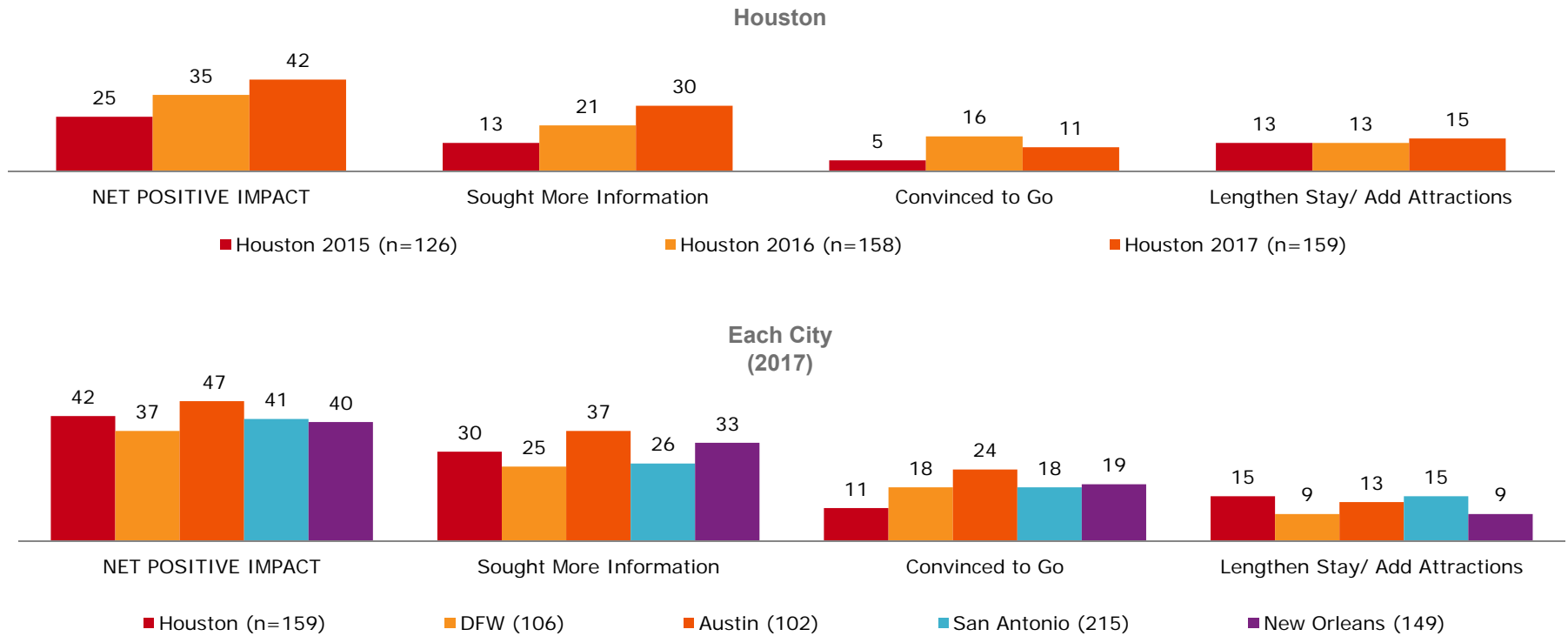
Q12. Abridged: For each city, please indicate what type of media you recall seeing/hearing advertising.

Most groups have similar unaided Houston media awareness



HV* = Houston Visitor
 Q12. Abridged: For each city, please indicate what type of media you recall seeing/hearing advertising.

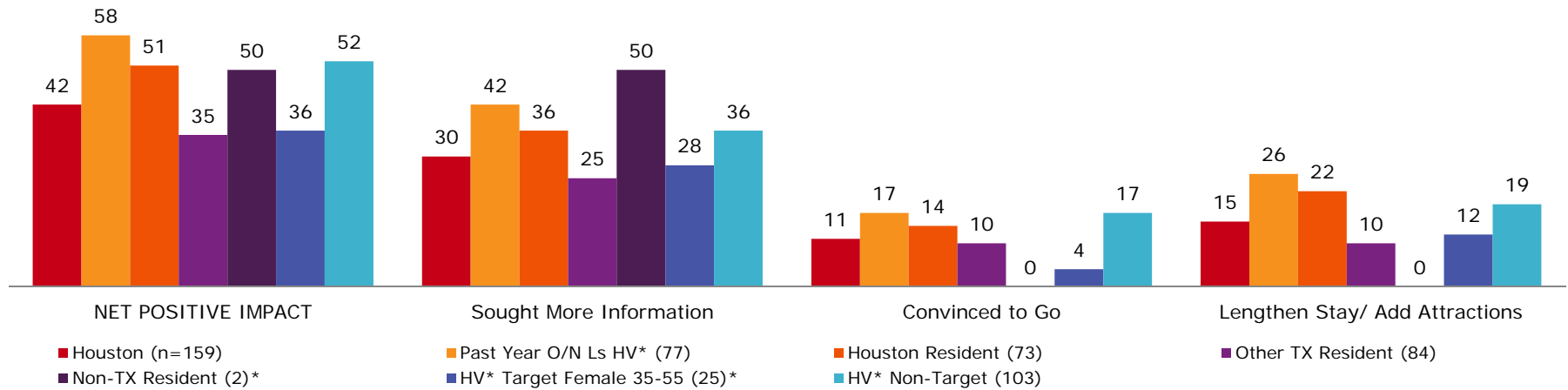
Impact of unaided ads: the competitive cities build similar levels of interest with Austin a bit ahead and Dallas slightly lagging; Houston climbs from last year



Q13. How has the advertising you've seen affected your leisure travel plans?

Ads (unaided awareness) have the largest impact on past year overnight leisure visitors

Houston



HV* = Houston Visitor

Q13. How has the advertising you've seen affected your leisure travel plans?

7
Specific GHCVB Ad Awareness



Houston television commercials

Cheer



Adventure

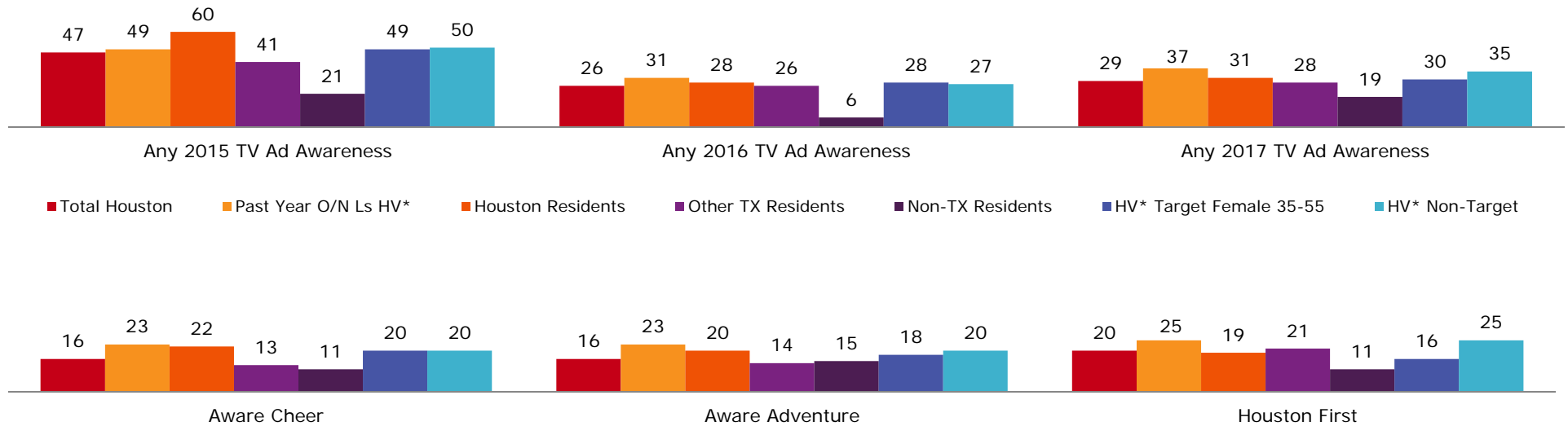


Houston First



Houston TV commercial awareness recovers slightly in 2017 (celebrity-endorsement ads discontinued after 2015)

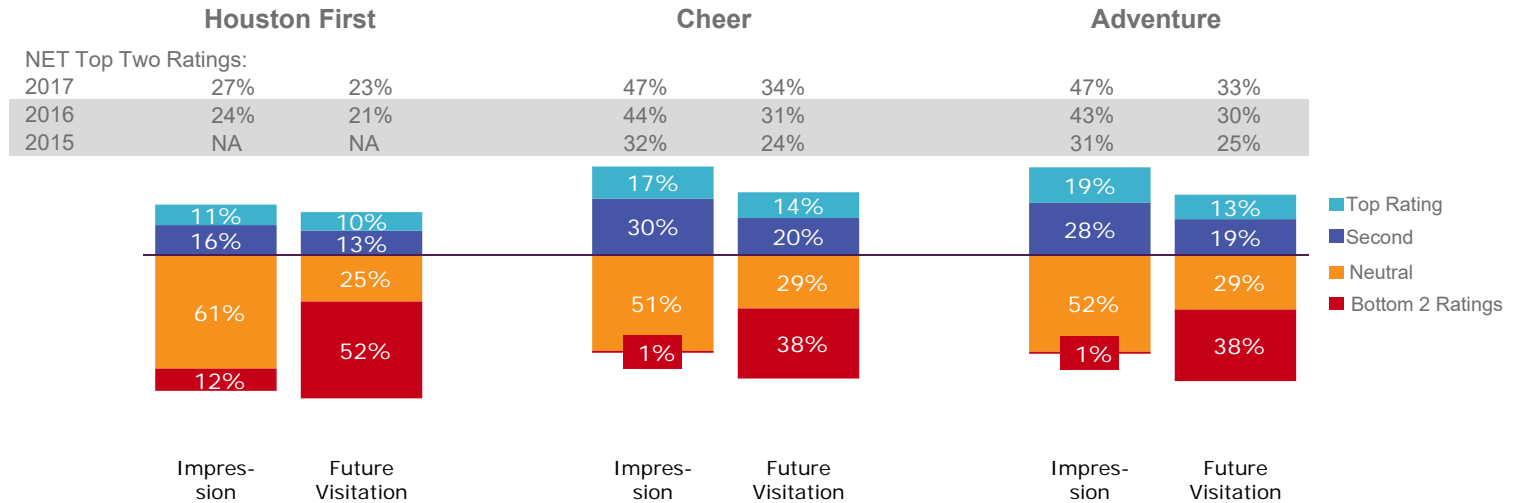
Awareness of Specific Houston CVB TV Commercials (2017 unless labeled otherwise)



HV* = Houston Visitor
Q35a. Have you seen this commercial before on TV?

Both impressions and likelihood for future visits rise from last year for all three commercials

Summary of Opinion/Reaction to Houston CVB TV Commercials
(Base: 806)

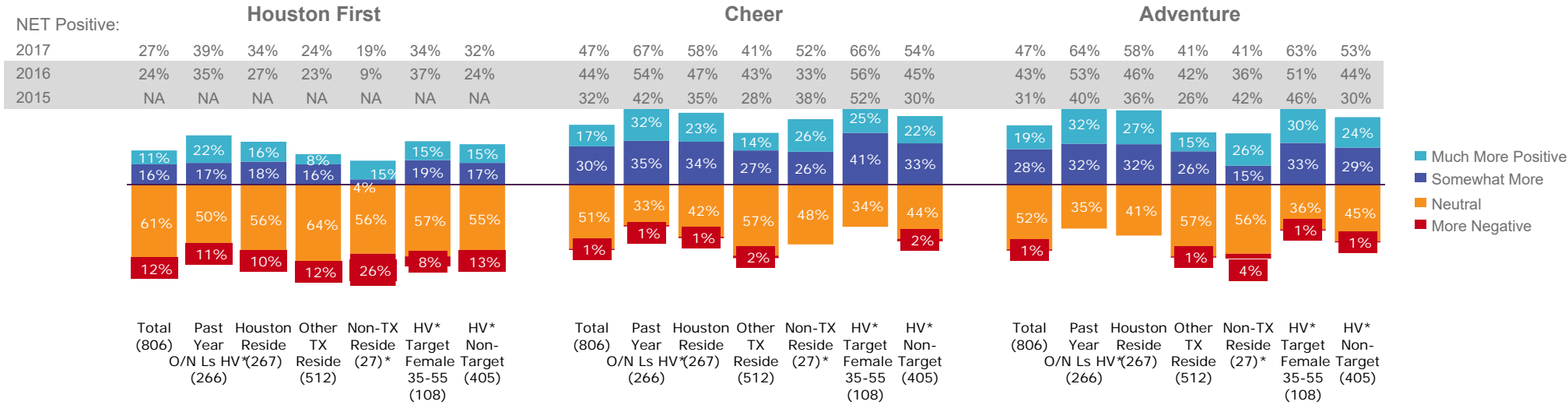


Q35b. Based on this commercial, how has your impression of Houston changed (5-point scale)?

Q35c. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

TV ad impressions of Houston still get the highest praise from past year overnight visitors and the target group; residents join in giving high marks to “Houston First”

Reaction to Houston CVB TV Commercial - Impression

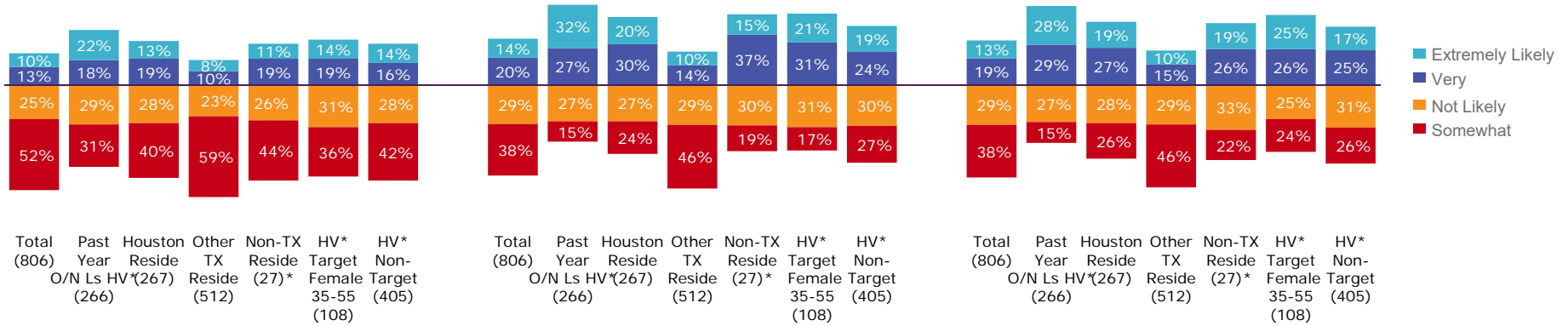


HV* = Houston Visitor
 Q35b. Based on this commercial, how has your impression of Houston changed (5-point scale)?

Likelihood of vacationing in Houston also gets stronger intent from past year overnight visitors and the target group

Reaction to Houston CVB TV Commercial – Influence on Future Vacation

NET Positive:	Houston First							Cheer							Adventure						
2017	23%	41%	32%	18%	30%	32%	30%	34%	59%	49%	24%	52%	53%	43%	33%	57%	46%	25%	44%	51%	43%
2016	21%	37%	27%	17%	15%	34%	23%	31%	49%	37%	27%	24%	43%	35%	30%	49%	36%	27%	30%	41%	34%
2015	NA	NA	NA	NA	NA	NA	NA	24%	40%	29%	18%	36%	45%	25%	25%	42%	31%	19%	40%	46%	26%



HV* = Houston Visitor

Q35c. Based on this commercial, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

Houston print ad

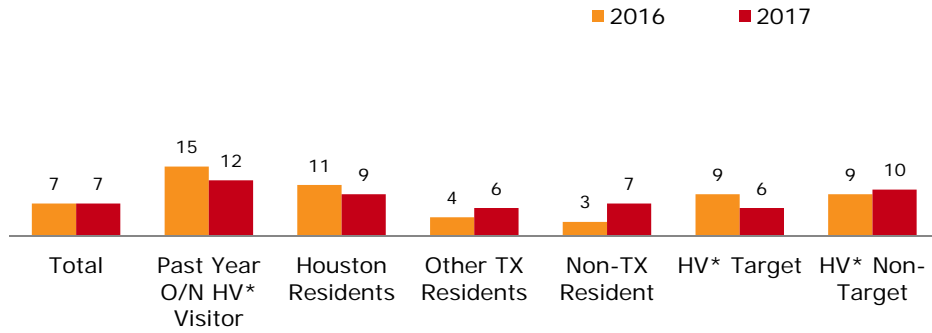


Texas Monthly
May 2016

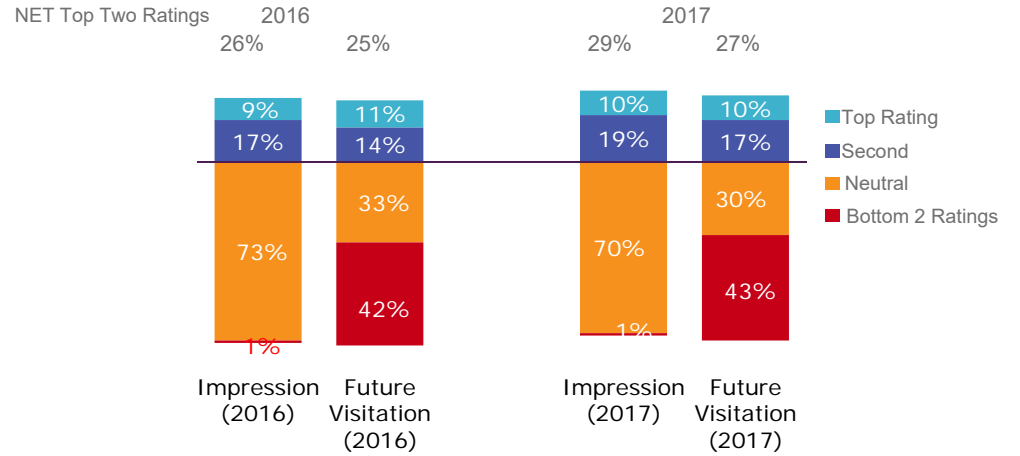
Although only a few (7%) recall the print ad, more than a quarter of viewers feel the ads lift their impression of and intent to visit Houston

Print Ad (Texas Monthly)

Ad Awareness



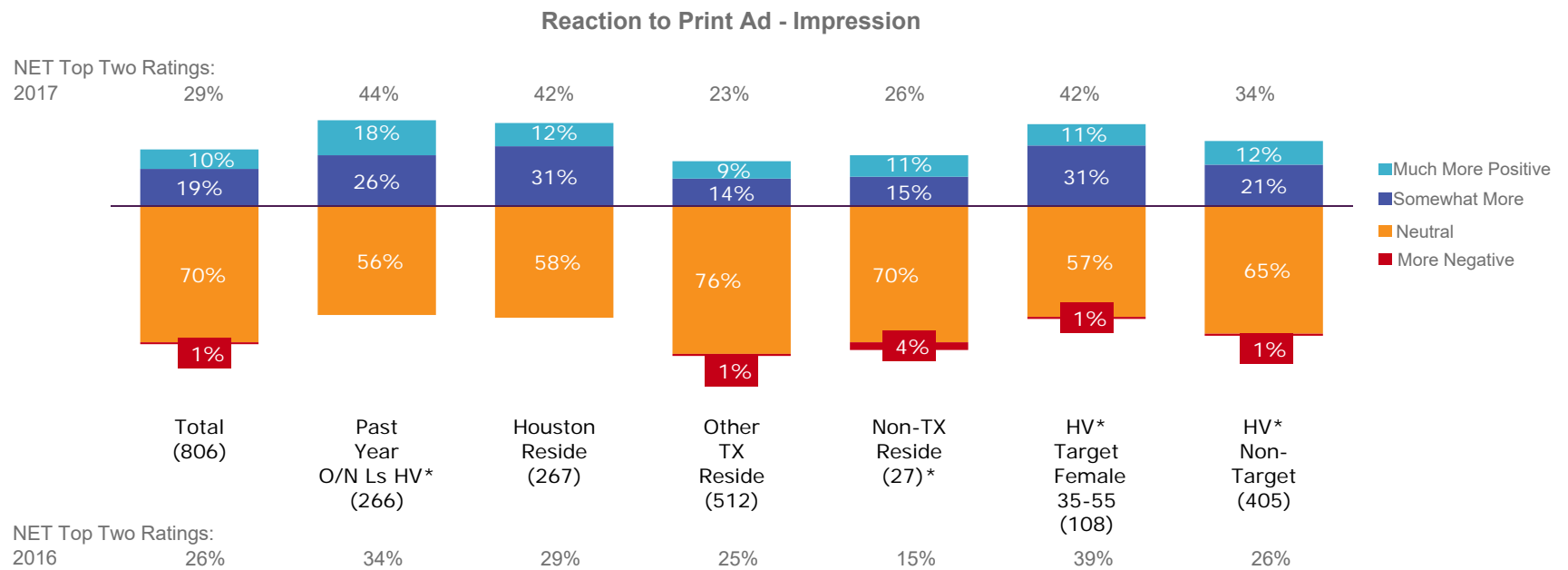
Opinion Summary



Q40a. Have you seen this print ad before?
 Q40b. Based on this print ad, how has your impression of Houston changed (5-point scale)?
 Q40c. Based on this print ad, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

Impressions of the print ad most positively influence past visitors, residents, and targeted females

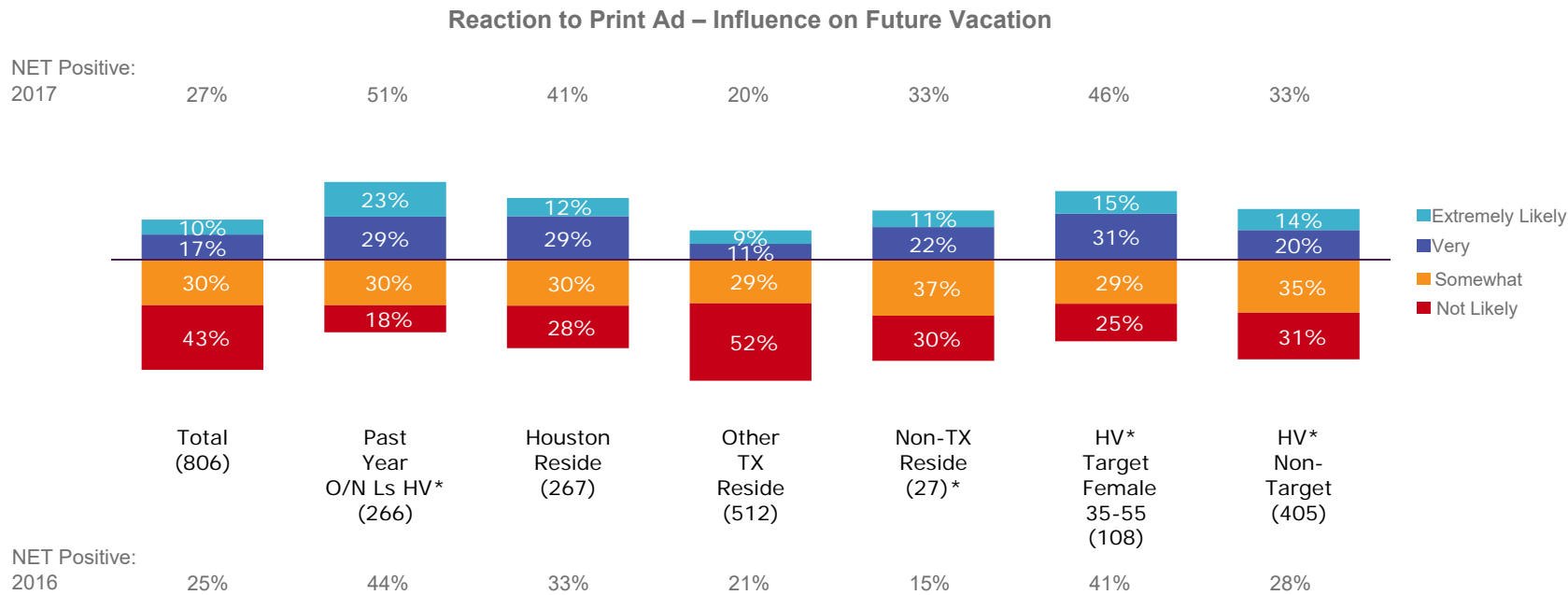
- However, even among these groups, most have a neutral opinion.



HV* = Houston Visitor

Q40b. Based on this print ad, how has your impression of Houston changed (5-point scale)?

The print ad encourages more than 1 in 4 to vacation in Houston – again, stronger among past visitors and the target group

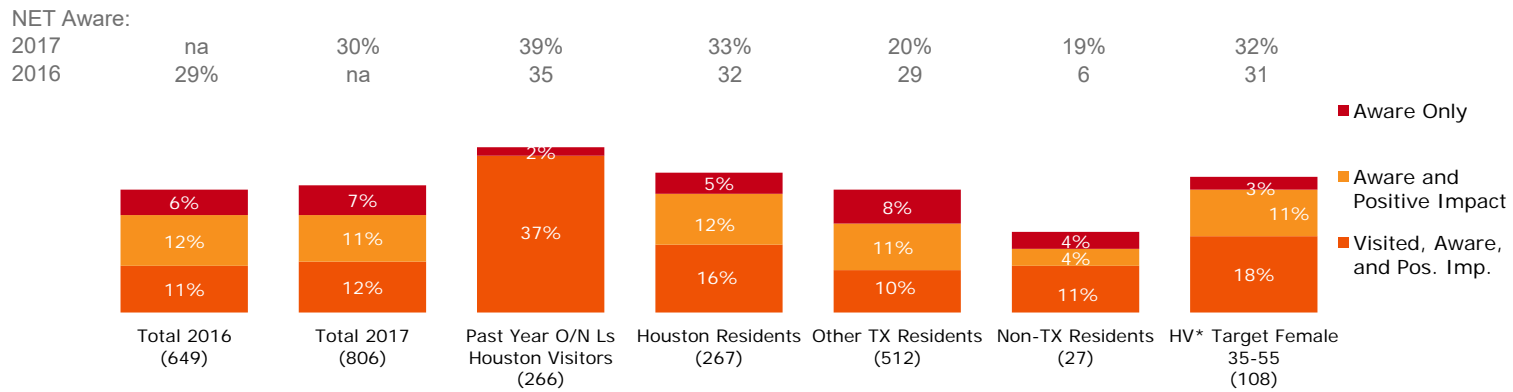


HV* = Houston Visitor

Q40c. Based on this print ad, how likely are you to take an overnight vacation or pleasure trip to Houston in the future (5-point scale)?

Total PAID advertising impact on Houston visitation

- Success of advertising depends upon conversion of viewers to visitors as well as awareness:
 - Advertising remains effective – encouraging roughly 1 in 8 (12%) to visit
 - Paid Houston advertising awareness still reaches nearly a third overall
 - Two caveats:
 - This measure combines features of current advertising with past travel – so it really measures Houston’s ongoing awareness and effectiveness, rather than these specific ads
 - Three measures, by definition, includes Houston visitors, so the effectiveness may look stronger than might be expected (Past Year Houston Visitors, Target Females, as well as the small group of Non-Texas Residents).

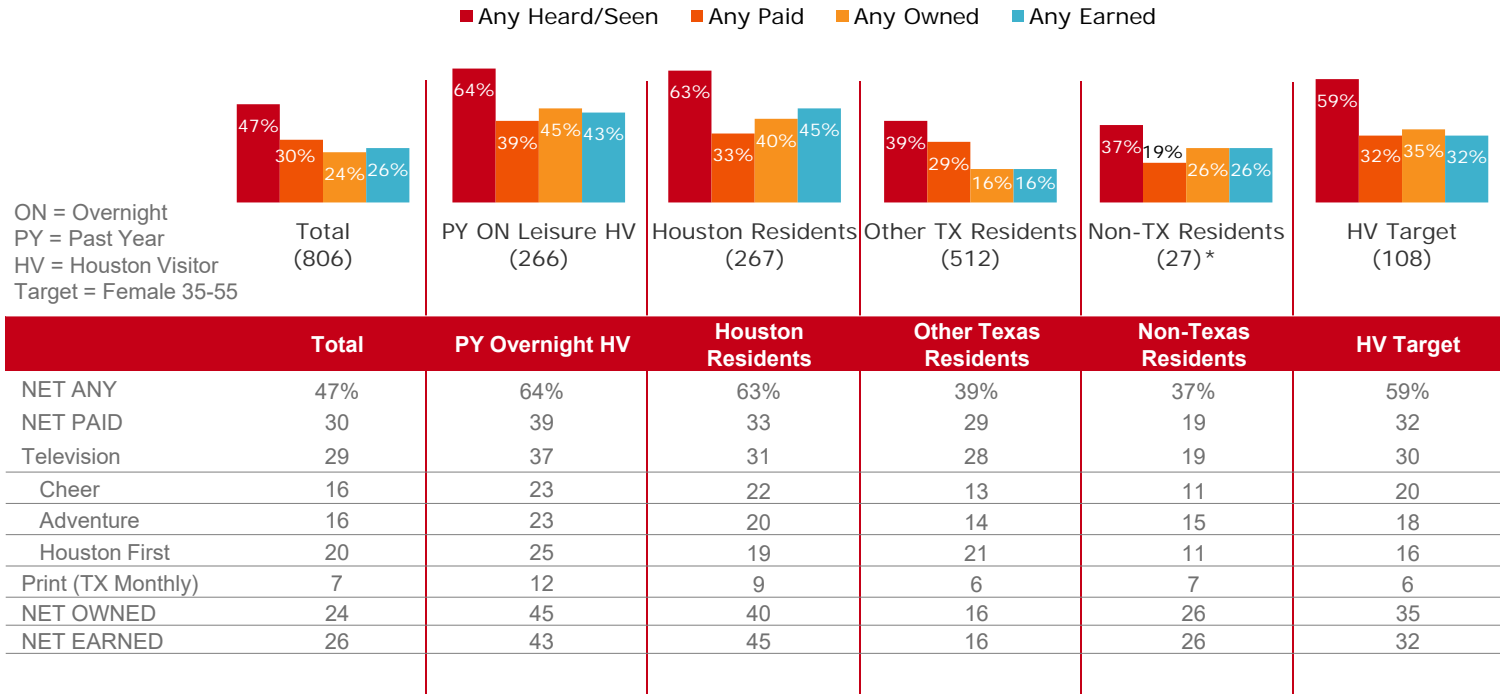


HV* = Houston Visitor
 Q14. Please indicate the total number of overnight leisure trips you have made to the Houston area in the past 12 months.
 Q35a. Have you seen this commercial before on TV (Houston First/Cheer/Adventure)?
 Q40a. Have you seen this print ad before (Texas Monthly May 2016)?
 Q35c/Q40. Based on these ads, how likely are you to take an overnight vacation or pleasure trip to Houston in the future?

Houston social media pages (owned)



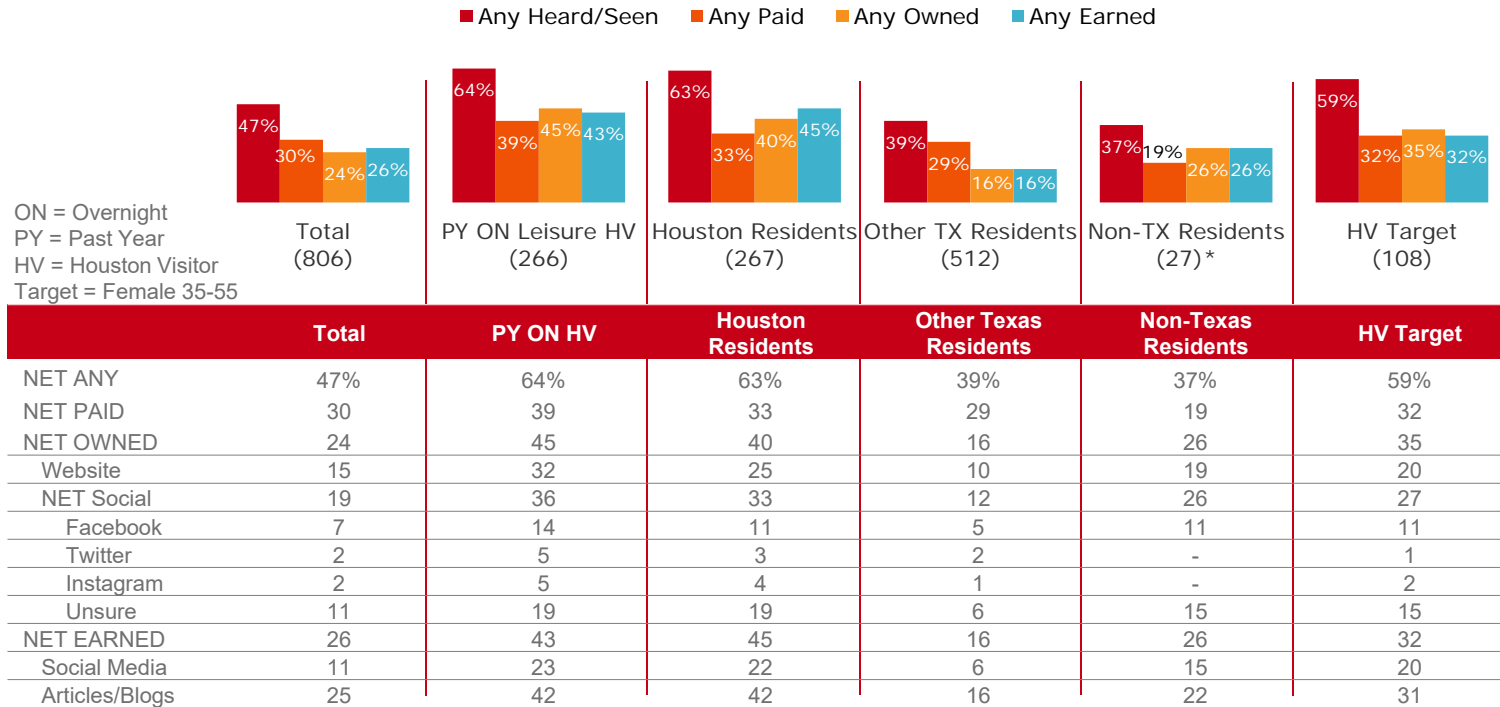
Awareness summary (paid, owned, earned)



Abridged: Have you seen ...

PAID: Print (Q40a); TV – Cheer, TV – Adventure, TV - Houston First (Q35a)
 OWNED: Website (Q19), Social Media Images (Q41 – Facebook, Twitter, Instagram)
 EARNED: Social Media (Q42), Print (Q43)

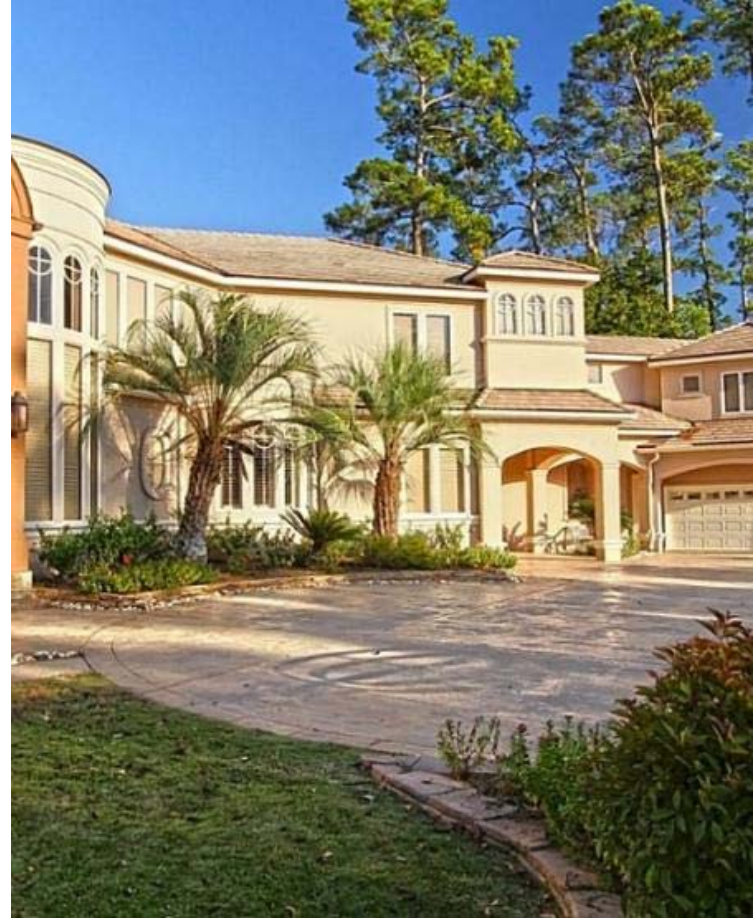
Awareness summary (paid, owned, earned) continued



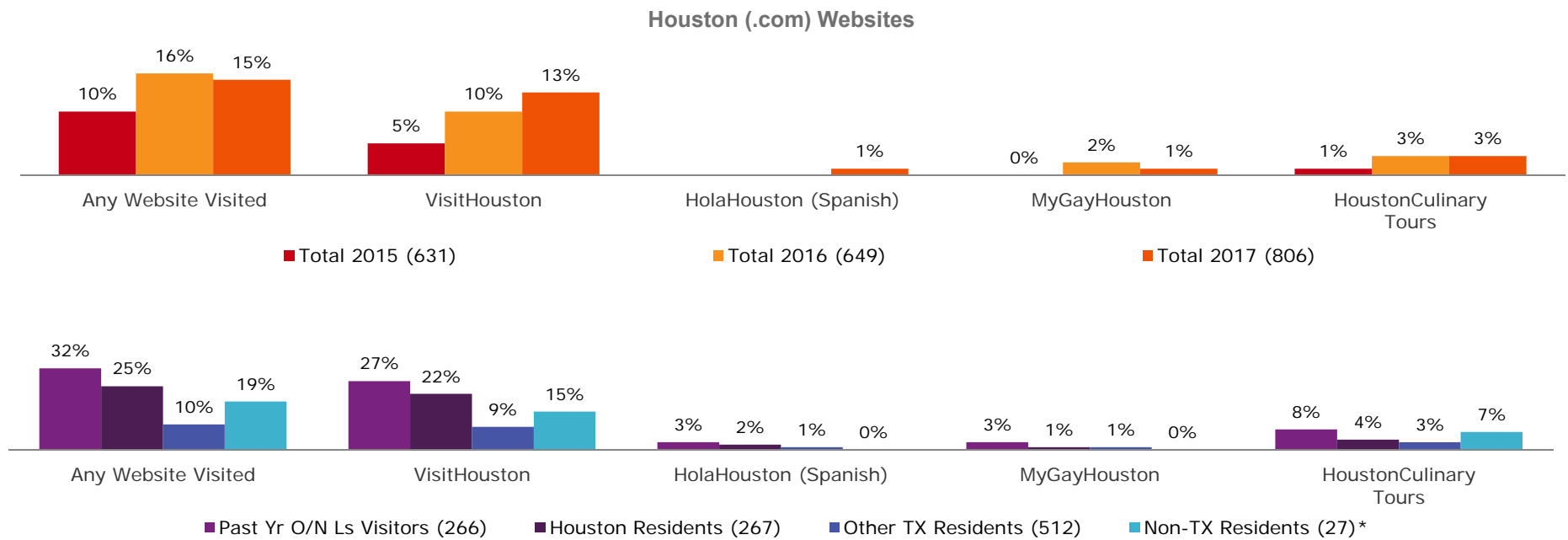
Abridged: Have you seen ...

PAID: Print (Q40a); TV – Cheer , TV – Adventure, TV - Houston First (Q35a)
 OWNED: Website (Q19), Social Media Images (Q41 – Facebook, Twitter, Instagram)
 EARNED: Social Media (Q42), Print (Q43)

8
Website Usage



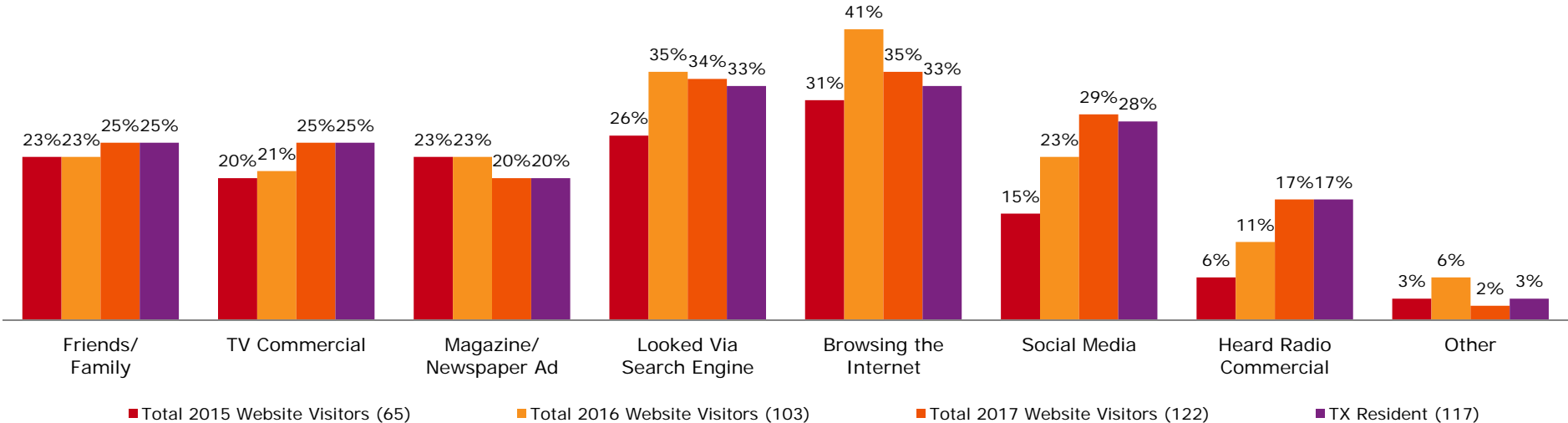
Overall visits to Houston websites place near last year and remain higher among past year visitors and Houston residents



Q19. Which of the following websites for the Greater Houston Convention and Visitors Bureau, if any, have you visited in the past 12 months?

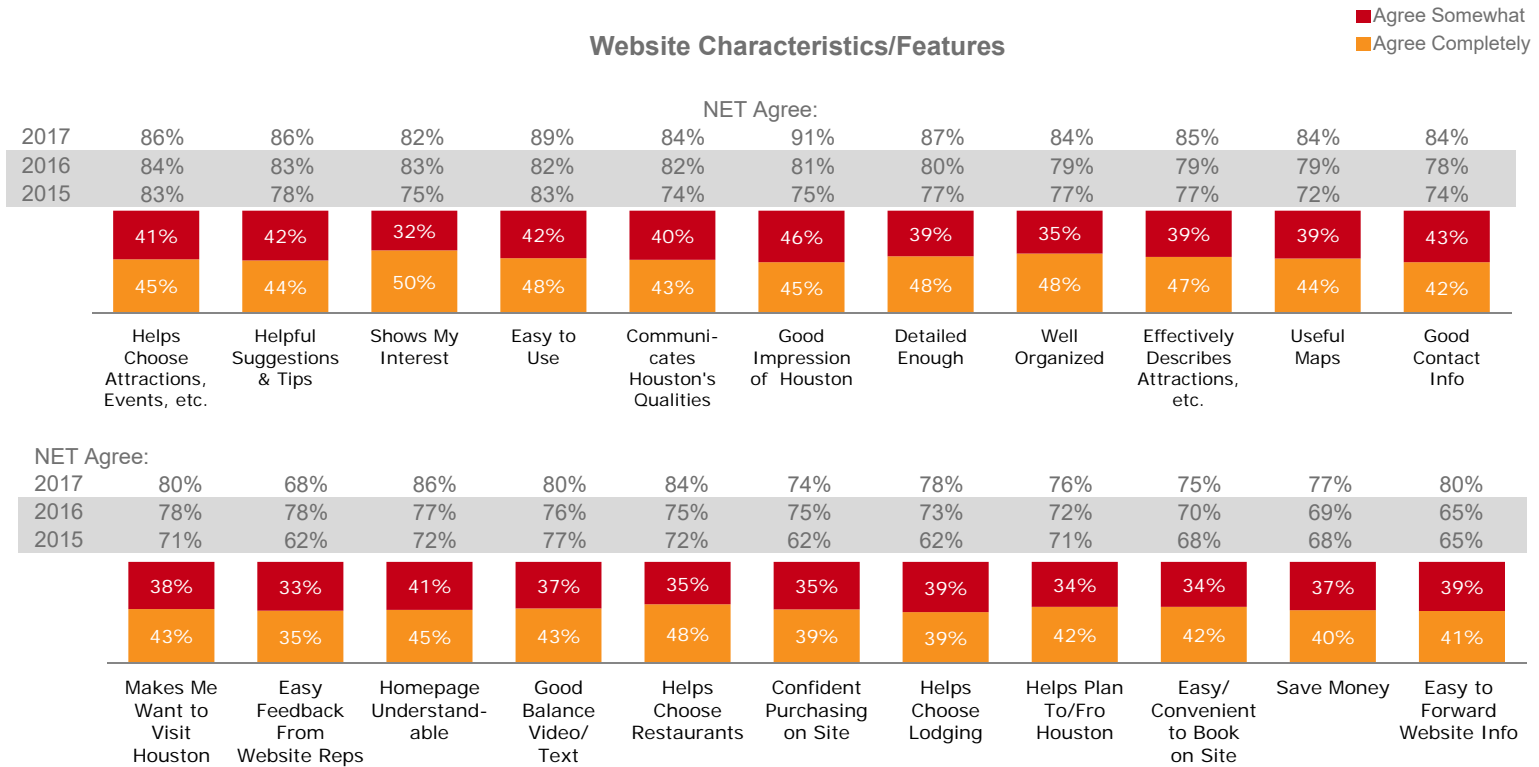
Visitors most commonly discover Houston’s websites by browsing the internet, search engines, and increasingly by social media; supplemented by several other ways

Website Visitors’ Source of Information
(2016 unless labeled otherwise)



* Non-Texas residents not shown due to very small sample
Q20. Please indicate how you found out about the Houston websites?

Users agree with most features about the website, particularly in making choices that suit them (attractions, tips, shows my interest, etc.)

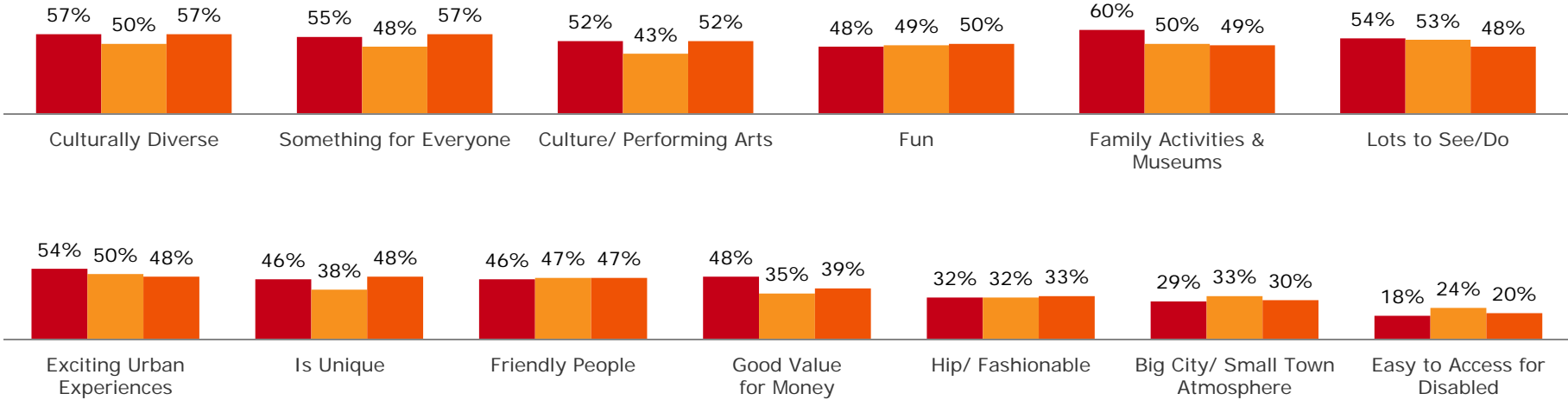


Q21. How much do you agree or disagree with the following statements regarding the VisitHouston.com characteristics or features?

Websites visitors still “take away” the diversity and culture of Houston

Website's Message
Base: 65 VisitHouston.com Visitors

■ 2015 ■ 2016 ■ 2017

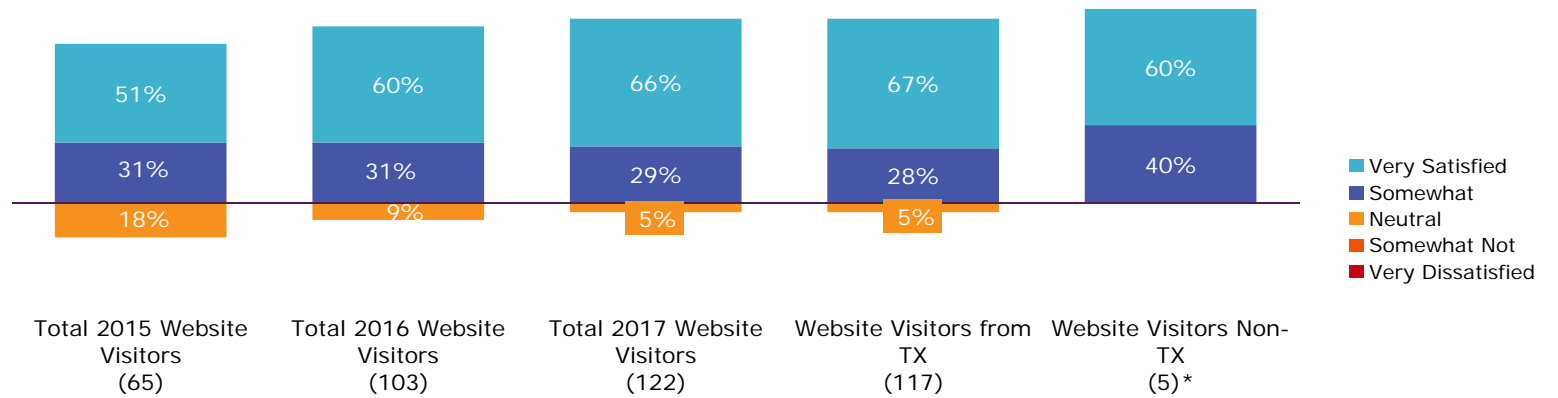


Q22. What does VisitHouston.com tell you about Houston?

Users praise VisitHouston.com; two-thirds give it the highest possible rating

Satisfaction with Houston Website (VisitHouston.com)

NET Satisfied:					Non-Texans
2017	na	na	95%	95%	100%
2016	na	91%	na	91%	na
2015	82%	na	na	82%	67%

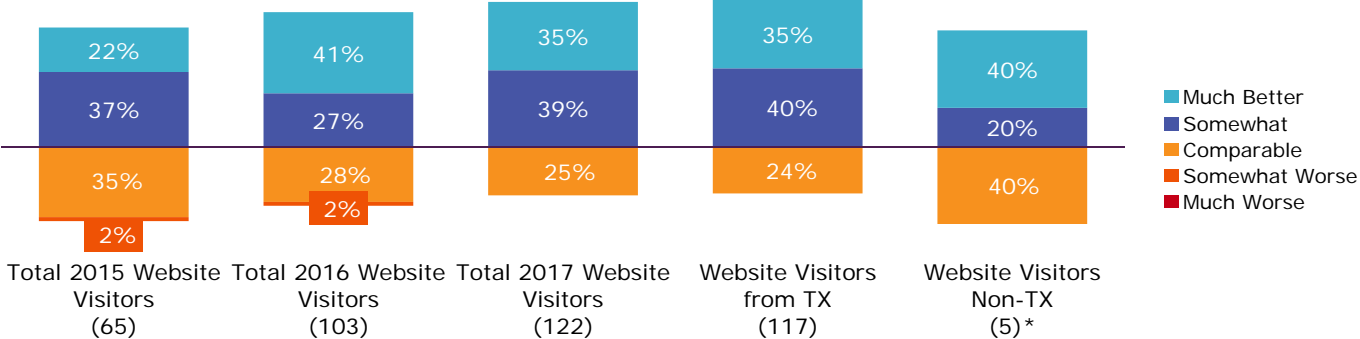


Q23. What is your overall satisfaction with VisitHouston.com?

Further, two-thirds of Houston’s website visitors deem it better than competitors and improving

Houston Website’s Competition

NET Better:					
2017	na	na	75%	75%	60%
2016	na	68%	na	69%	na
2015	58%	na	na	58%	na



Q24. How well does VisitHouston.com compare to similar websites for city destinations?

Most users praise the website features

Suggestions include discounts/savings and even more city information.

Website Features to Improve: 2015

- None/nothing to improve, everything is OK as it is, the site is very good (31)
- Several mention information that they would like to see: (12)
 - More coupons/sweepstakes/discounts (4)
 - Getting around in traffic/traffic reports (2)
 - More pictures/colorful pictures (2)
 - Better/more links (2)
 - More discounts on restaurants & events
 - Directions to/from location
 - Add more weird/out-of-the-way places
 - All the secret places that don't advertise
 - Be more specific about what's happening – when and where
 - More for locals
 - More museums
 - More restaurant info
 - Children friendly activities
 - Emphasize problem with humidity, especially at night – September is still summer at 95 degrees/95% humidity
- Interested in touring by bike – found just what I needed
- Just keep updating all the great places/ restaurants and attractions
- Site needs to be simpler to maneuver
- Number of mentions = 1 unless in parens (#)

Website Features to Improve: 2016

- None/nothing to improve/no problems or improvements to speak of/good/great (42)
- The site is inclusive – used it as my one source
- Several mention information that they would like to see: (17)
 - More detail/selections/specifics (4)
 - Categorized restaurants (American, Asian, Mexican, etc.); more restaurants; more restaurant photos/menus (3)
 - Better/more links/place to save links (2)
 - More deals/lower prices (2)
 - More exciting activities
 - More emphasis on younger singles; it caters more toward families
 - Show gas prices
 - Include more non-tourist features
 - Maybe more about tours to book?
 - More coupons
- It's already the best of the best
- All sections are organized well and no need to improve, but would recommend to change the design of the website from time to time
- Lots of sections – really thought of everyone
- I'll visit (the website) before my next trip!
- Would be great to see an updated bus schedule
- Number of mentions = 1 unless in parens (#)

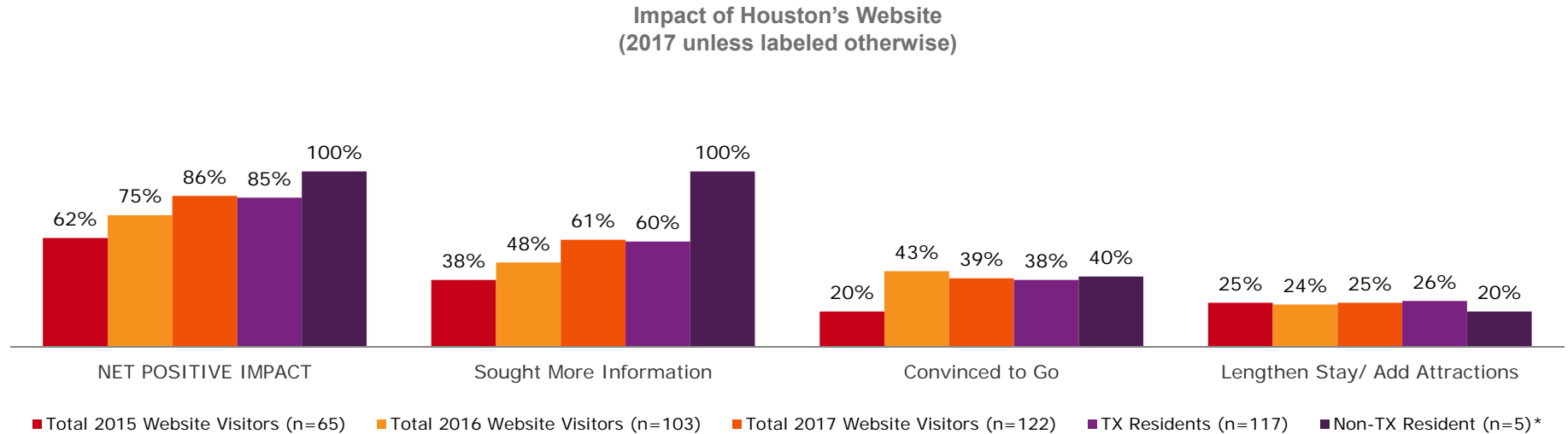
Website Features to Improve: 2017

- None/good/nothing to improve/good as is/great /satisfied/ enjoy It as it is, fits my needs perfectly (50)
- Easy to navigate/well laid out to find things to do/site in packed full of info for everyone /very comprehensive (6)
- Several mention information that they would like to see: (28)
 - Photos and pictures (5) and videos (1)
 - Coupons/Discounts to families (4)
 - Show prices (food/events/etc.) (4)
 - Add surrounding area attractions and events (3)
 - Add "hidden gems," useful tips, shopping tip sections (3)
 - Incentives for restaurants with menus and pricing
 - More interactive maps
 - More on activities – amusement parks/museums/etc.
 - Nightlife, specifically Gay and Lesbian bars/nightclubs
 - More on nightlife, including clubs and casinos
 - Houston parking is a problem; show where parking is available for events, especially downtown
- Maintenance ... a little slow and some listings give little info or links are no longer active (2)
- More attention-grabbing design that better reflects Houston's culture and diversity
- Nix the unwanted pop-ups
- Comment on Houston, not the website: Houston needs more attractions. Six Flags never replaced, Grand Texas has taken ages to develop and is not convenient to Central Houston
- Number of mentions = 1 unless in parens (#)

Q25. What features or sections should the website improve?

Most (86%) website visitors take further action (usually to seek more information)

- Note: The website does not affect everyone positively; potential visitors may decide not to visit (5% in 2016) or simply believe that the website did not influence them at all (12%, not shown).



* Very small sample; treat as qualitative only
Q26. How did your visit to VisitHouston.com affect your leisure plans?

9

Attitudes/Characteristics

Topics:

Satisfaction

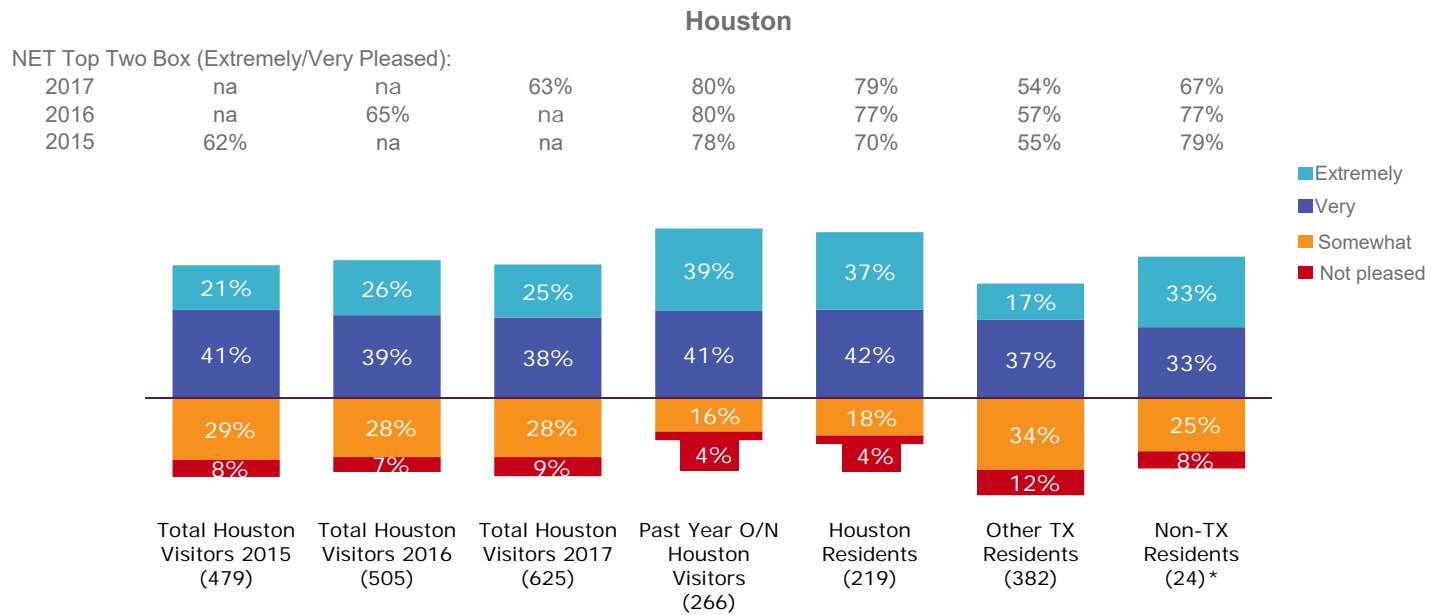
Profiles

Trip choices and characteristics (including demos)

Purposes and Research Methods



Houston continues to *satisfy* most overnight visitors, especially recent ones (past year) and Houston residents



Q18. Overall, how pleased were you with your last overnight leisure trip to the Houston area?

Characteristics of the key Houston visitors

Prime (Lucrative) Houston Visitors (Past Year O/N Visitors)

- Age 51
- Above Average Income (\$82,705)
- Likely married (62%)
- College Grad (53%)
- Caucasian (76%)

Target/Core Visitors (Females 35-55)

- Age 45
- Above Average Income (\$92,786)
- Likely married (73%)
- College Grad (58%)
- Caucasian (77%)

Typical US Traveler

- Age 46
- Average Income (\$80,600)
- Married (60%)
- College Grad (48%)
- Caucasian (84%)

Trips to Houston follow logical patterns:

- Houston residents, living within close proximity to city events and attractions, take far more day trips than residents outside of Houston
- Visitation places between the two prior years, both day (37%) and overnight (33%) trips
- While most do not spend the night, they usually (70%) opt for a hotel if they do; length of stay matches last year.

	Total 2015 (n=631)	Total 2016 (n=649)	Total 2017 (n=806)	Past Yr. O/N Leisure Visitors (n=266)	Houston Residents (n=267)	Other Texas Residents (n=512)	Non-Texas Residents (n=27)*
Day Trips							
NET Any	35%	40%	37%	62%	70%	21%	33%
Mean (Inc. 0)	1.8	2.5	2.1	3.6	5.1	0.6	1.1
Mean (Excl. 0)	5.1	6.2	5.7	5.8	7.4	2.9	3.3
Overnight Trips							
NET Any	31%	34%	33%	100%	40%	27%	70%
Mean (Inc. 0)	1.1	1.8	1.2	3.5	1.7	0.8	2.2
Mean (Excl. 0)	3.5	5.3	3.5	3.5	4.3	2.9	3.1
Hotel Nights in Houston							
% With a Hotel Stay in Houston	17%	23%	26%	79%	34%	21%	52%
% of Houston O/Ns w/ Hotel Stay	56%	70%	79%	79%	84%	76%	74%
Average Total Hotel Nights (if any)	3.4	4.1	4.1	4.1	4.7	3.8	2.9
Average Hotel Nights/Trip (if any)	2.2	3.1	2.7	2.7	2.6	2.8	2.6

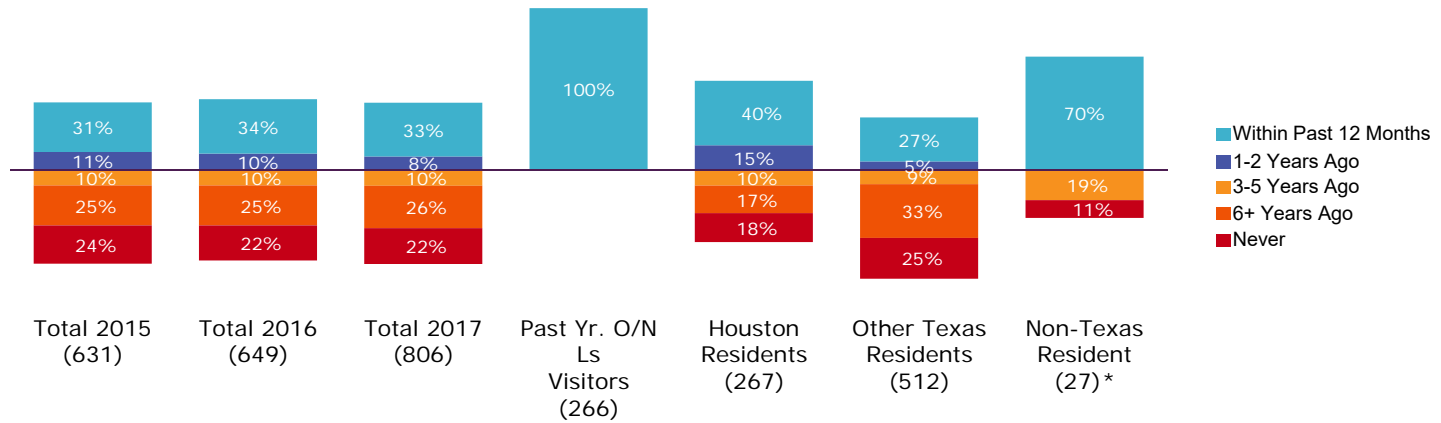
Q14. Please indicate the total number of leisure trips you have made to the Houston area in the past 12 months.
 Q14a. Of all your overnight trips to Houston in the past 12 months, how many total nights did you stay in a hotel?
 Q14b. On your last overnight trip to Houston, how many total nights did you stay in a hotel?

Houston attracts a similar share of overnight leisure visitors (past 2 years) as in the past

Elapsed Time Since Last Houston Overnight Visit (2017 unless labeled otherwise)

NET Within Past 2 Years:

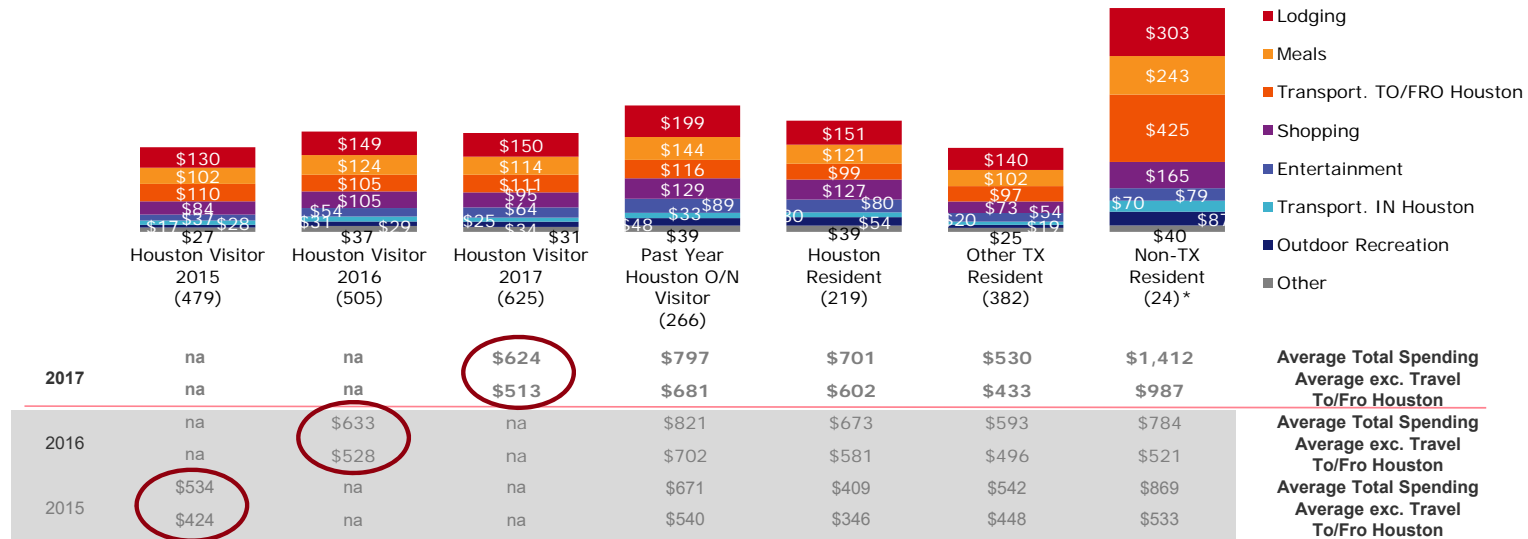
2017	na	na	41%	100%	55%	32%	70%
2016	na	44%	na	100%	51%	35%	79%
2015	42%	na	na	100%	39%	36%	87%



By definition: Must have visited Houston in past 5 years, business or leisure, overnight not required
 Q15. When was your last overnight leisure trip to the Houston area?

Overnight spending in Houston nearly matches last year, with or without transportation costs; Non-Texans spend the most; recent (past year) overnights rank second

Total Travel Party Overnight Spending on Last Trip to Houston
(Column Height Impacted by Expenditure)



Q17. Please estimate the dollars your travel party spent for each of the categories below on your last overnight leisure trip to Houston?

Demographics

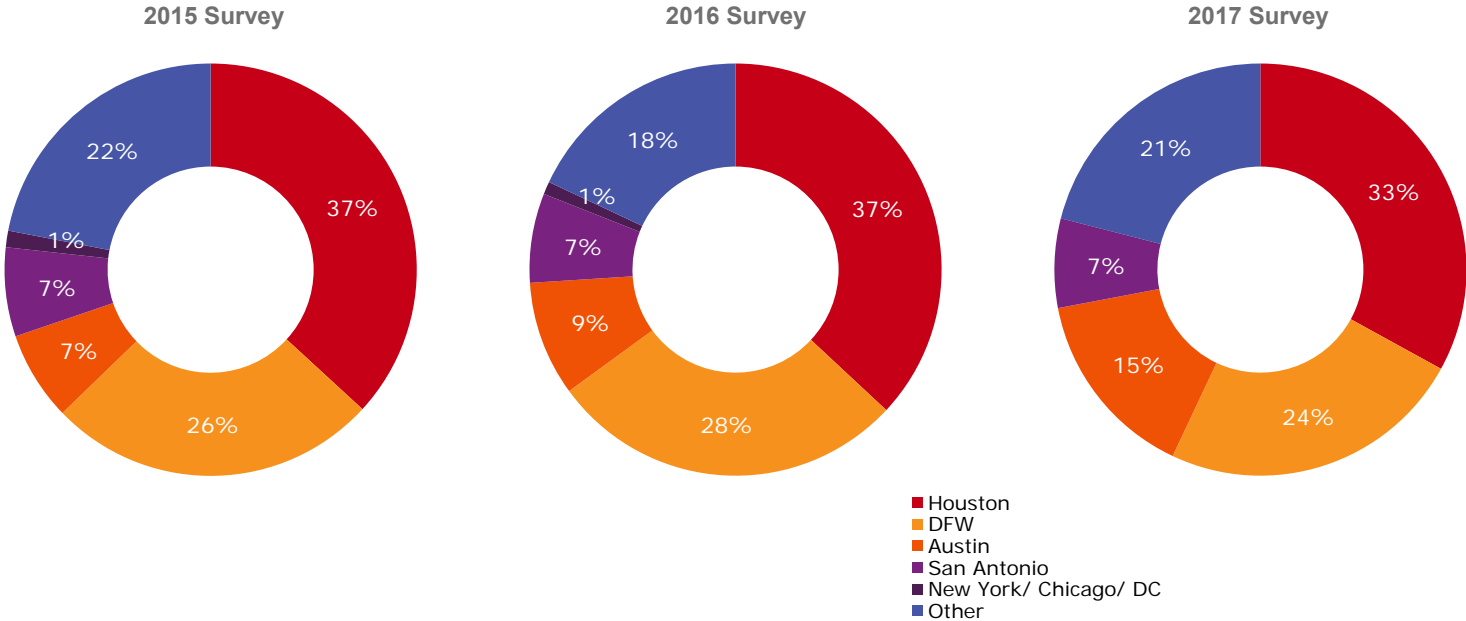
- Characteristics vary slightly by residence, with non-Houston Texas residents continuing to report lower incomes than other segments.

2017 Survey Demographics	All Travelers	Past Yr. O/N Leisure Visitors	Houston Residents	Other Texas Residents	Non-Texas Residents	Website Visitor
Average Age	55	51	48	59	56	43
Average Hhld Income	\$72,937	\$82,705	\$84,382	\$66,860	\$77,955	\$71,250
% Male	39%	42%	36%	40%	30%	40%
% Married	63%	62%	67%	62%	33%	61%
% College Grads	48%	53%	53%	46%	46%	51%
Ethnicity						
% Caucasian	83%	76%	77%	88%	100%	66%
% Spanish Origin	10%	13%	12%	9%	7%	16%
% African-American	8%	12%	10%	7%	-	15%
2016 Survey						
Average Age	55	52	54	56	61	44
Average Hhld Income	\$73,917	\$80,179	\$77,821	\$70,985	\$79,333	\$73,442
% Male	35%	37%	31%	38%	33%	39%
% Married	68%	68%	66%	69%	70%	71%
% College Grads	51%	58%	58%	47%	57%	55%
Ethnicity						
% Caucasian	87%	83%	84%	88%	85%	77%
% Spanish Origin	9%	11%	9%	10%	-	19%
% African-American	6%	8%	7%	5%	3%	8%
2015 Survey						
Average Age	57	55	57	57	58	53
Average Hhld Income	\$67,296	\$75,843	\$67,365	\$65,620	\$77,906	\$69,023
% Male	34%	35%	29%	38%	34%	31%
% Married	67%	72%	61%	70%	74%	71%
% College Grads	43%	51%	41%	43%	53%	53%
Ethnicity						
% Caucasian	84%	79%	79%	87%	85%	66%
% Spanish Origin	7%	7%	7%	8%	-	14%
% African-American	7%	11%	10%	5%	9%	15%

QA. What is your age? // QB. Are you . . . (male/female) // Panel: Income, Education, Marital Status, Ethnicity.

Residence: Mirroring the past, most (79%) of those in key markets live in a major Texas metro area

- More than a third live in Houston (37%).



City of residence comes from TNS panel.

Research methods – follow-up survey

The eighth follow-up survey of Houston visitors measures travelers’ choices and behaviors, estimates advertising effectiveness/ROI (including awareness of earned and owned media in 2016 and 2017), and assesses web usability against a competitive set of Austin, Dallas and Fort Worth, New Orleans, and San Antonio. Dallas and Fort Worth were treated as a single entity. Future research will isolate these cities in order to better reflect awareness, image, and favorable impression ratings.

Three key groups who had completed TNS’ TravelsAmerica study in 2012-2016 were re-contacted to participate in the follow-up study:

- Texas residents
- Houston residents
- Houston visitors

It should be noted that all references to Houston only refer to Houston not the surrounding areas of Galveston, Beaumont, The Woodlands, Conroe, etc. The field period ran from July 17- August 15, 2017, somewhat later than in prior years (May 16-26, 2016, June 17–28, 2015; and June 16–23, 2014).

# of Respondents 2014	# of Respondents 2015	# of Respondents 2016	# of Respondents 2017	Sample Group
263	194	218	266	Past Year Overnight Leisure Visitors
300	233	238	267	Houston Residents
416	345	378	512	Texas Residents Outside Of Houston
98	53	33	27	Non-Texans Who Have Visited Houston
813	631	649	806	Total

10

Appendix II

Topics:
Results from CY 2016 TravelsAmerica for
Houston visitors



Volume of visitors (person-trips) to Texas cities (3-year rolling)

Houston gains more than most competitors.

Note: Uses a 3-year rolling average to dampen sample volatility.

Person Trips (Visitors)/ Unweighted Interviews	CY 2014	CY 2015	CY 2016	2016 - 2015 % Change	2016 - 2014 % Change
Total US	1,158,981	1,268,097	1,320,548	4%	14%
Total Texas	82,752	91,512	98,319	7%	19%
Total Houston	13,540	15,938	17,273	8%	28%
Dallas/Ft. Worth (Net)	19,807	22,245	23,787	7%	20%
Austin	9,325	11,207	12,639	13%	36%
San Antonio	10,980	12,104	12,764	5%	16%
New Orleans	8,222	9,327	10,032	8%	22%

Q4a. Please indicate the US state(s) visited (Person Trips - proj.) (day or overnight trip)

Q4d. Please indicate the US cities(s) visited (Person Trips - proj.) (day or overnight trip)

Research methods - TravelsAmerica

The syndicated TravelsAmerica study collects data via a web based methodology. Sample is selected from the TNS USA panels and partners with e-mail invitations sent monthly to representative households. The field period runs for two weeks each month, usually starting in the middle of the first week.

To enhance relevance, the data are weighted two ways:

- **Demographic weights** adjust respondents by demographic factors, including region, age, and income, to closely represent the characteristics of US households
- **Trip and state projection calculations** collects detailed information for up to three trips in the past month to project the actual number of trips taken. In the case of city level calculations, each trip taken to that city counts. A few tables represent person-trips – these take into account the immediate travel party size for each trip as well. For projections, the counts are weighted to reflect the actual number of US households and total trips.

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for Greater Houston. For the calendar years 2014 through 2016, respondents (does not include others in travel party) for Houston and total are shown below.

CY 2014 #of Travelers (Unweighted)	CY 2014 # of Travelers (Weighted)	CY 2015 #of Travelers (Unweighted)	CY 2015 # of Travelers (Weighted)	CY 2016 #of Travelers (Unweighted)	CY 2016 # of Travelers (Weighted)	Region
572	702	760	664	677	728	Houston Visitors
64,506	66,547	63,544	65,318	60,330	61,252	Total TravelsAmerica

Glossary

Term	Definition
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year (CY)	January 1 through December 31
In-State	Texas
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to an area counts)
State Volume	All trips taken to/within the state
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This eliminates some leisure day trips, such as some visitors from Galveston, since the distance is about 50 miles
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
Visitor	Person who has visited Houston in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer).

Fun Facts

25 Things You Should Know About Houston (Jeff Wells*)

1. It's named after Sam Houston
2. Once the capital of Texas (1837-39), the city got a boost after two Allen brothers promised land & building incentives (to TX congress)
3. The Allen brothers also claimed that ships could sail "without obstacle" from New York to Houston in an effort to bring commerce to the city in its early days
4. Houston is one of the busiest port cities in the nation
5. During the Texas oil boom, Houston was home to some of the richest men in the country, including at least one "wildcatter," digging wells throughout Texas
6. A system of tunnels that today spans six miles and connects 95 city blocks was started in 1935.
7. The Texas Medical Center (largest in the world) sees 7.2 million patient-visits per year (3x Houston's population)
8. NASA's Johnson Space Center was originally awarded to Tampa Bay, but military officials there declined to shut down MacDill Air Force Base, plus many Washington politicians at the time were from Texas (including Lyndon Johnson and Sam Rayburn)
9. Houston is the largest city in the country with no formal zoning laws
10. Houston's Art Car Museum (Garage Mahal) blends subversive art and car culture
11. The National Museum of Funeral History is located there
12. Very diverse, 145 different languages are spoken by its residents (including 25 who speak Welsh).
13. Houston's theatre district, with nine performing arts organizations, claims the second highest concentration of theatre seating in the country
14. Houston's rodeo and livestock show is one of the largest in the world, spanning 20 days in March
15. Houston is home to the Beer Can House – a house covered with more than 50,000 cans of beer
16. Bayou Bend, now among the most popular museums, is the former home of Ima Hogg, an influential philanthropist
17. A Houston hip-hop group (Geto Boys) recently ran a Kickstarter campaign featuring a custom-made casket as a funding gift
18. Before they were the Astros, Houston's Major League Baseball team was the Colt .45s
19. Houston's Astrodome, now empty, was once known as the "Eighth Wonder of the World"
20. Houston residents eat out an average of 4.8 times a week
21. Food ranges from upscale steak, local seafood, vegan, or the Hubcap Grill (with a burger topped with Cheetos and cheese sauce).
22. Nicknamed "Bayou City," Houston is crisscrossed with 2500 miles of bayous, rivers, and other waterways
23. Houston is home to the first traditional Indian temple in North America, build in 1988
24. Beyonce Knowles got off to a superstar start, beating competitors twice her age in a talent show (with a soulful rendition of "Imagine").
25. The project, "Big Bubble" is a way to aerate the water along the river walk beneath Preston Street bridge, encouraging strollers to push a red button that causes bubbles to erupt from the bayou nearby.

KANTAR TNS

Thank you